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**Second Language Learning at a Distance: Metacognition, Affect,
Learning Strategies and Learner Support in Relation to the
Development of Autonomy**

Volume 1: Introduction to the published work

**Articles and chapters submitted in fulfilment of the regulations for the degree of
Doctor of Philosophy by published work**

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DEDICATION

This thesis is dedicated to my two sons, Daniel and Ben. Sadly, Daniel died on 7 July 2001 aged 29. Both my sons have been an inspiration to me in initiating, continuing and completing this work.

DECLARATION

This submission comprises twelve publications, ten of which were sole-authored.

Publication 4, 'Developing autonomy in a distance language learning context: Issues and dilemmas for course writers', was written with Tita Beaven and Ane Ortega. My contribution was 60% as agreed with my co-authors. Publication 9, 'Exploring the link between language anxiety and learner self-management in face-to-face and virtual language learning contexts', was jointly authored with Mirjam Hauck, with equal contributions from us both.

ABSTRACT

This work is based on nine articles, two book chapters and one set of conference proceedings published between 1998 and 2007 on independent language learning in universities. I also refer to papers I have published that are concerned exclusively with language learning and teaching in adult education in order to contextualise my research. The publications selected for this work chart my evolution as a researcher and teacher, moving from a conventional adult education setting to self-access in a new university and finally distance learning at the Open University, UK. At each stage of this educational journey, autonomy took on an increasingly significant role, with distance learning at the extreme end of the spectrum, a setting which required autonomy to be firmly embedded in theory and practice.

The thesis is divided into two main parts: (1) autonomy (2) metacognition and affect, strategies and learner support. The narrative draws together these themes, and explores links between the constructs, and their interrelationships. Publications 1-5 focus on the concept of autonomy and the issues it raises for learners and teachers in both self-access and distance learning settings. The first three articles investigate autonomy in self-access contexts. The fourth and fifth publications concentrate more specifically on the distance language learning context. These five articles and chapters examine definitions and interpretations of autonomy; its psychological and social dimensions; its relationship to critical reflection; its place in successful language learning; and its function as a key transferable skill for vocational and other purposes. Finally, the role of autonomy and its practical application – self-regulation or self-management – is discussed in specific relation to distance language learning.

Publications 6-12 explore metacognition and affect in independent learning settings, the role of language learning strategies to promote self-regulation in the development of autonomy, and issues for learner support. In this section, the focus is mainly on distance language learning, (reflecting my move to the Open University, UK), although many of the arguments are equally applicable to independent language learning settings in general. The role of metacognition is discussed from the dual perspective of knowledge of self, and skills used to manage the learning process (Flavell, 1976). Affective factors, notably beliefs, anxiety and motivation, are explored in relation to the special characteristics of the distance language learning environment, in particular the call on affective resources in the absence of a teacher. This leads naturally to an examination of the strategies that distance learners employ to cope with the demands of their learning setting, and to implications for learner support.

This work makes an important contribution to the field of distance language learning through its focus on the centrality of the learner, the processes involved in second language acquisition (SLA) at a distance, and the need to explore related concepts from the learner's perspective. The empirical studies I have carried out using both quantitative and qualitative research instruments take forward the state of current knowledge in the field by offering original insights into the perceptions, thoughts and feelings of distance language learners and the strategies they use to manage in a distance context.

Underpinning my research is a view shared by a growing number of researchers in applied linguistics today that 'language learning, more than almost any other discipline, is an adventure of the whole person, not just a cognitive or metacognitive exercise' (Oxford & Burry-Stock, 1995: 18).

NOTES ON REFERENCES

This work makes reference to 34 publications (28 that I have sole-authored), of which 12 are submitted in support of my thesis. The non-submitted publications are articles and chapters, co-edited books, conference proceedings, or short pieces in language periodicals or bulletins. Together, in charting my evolution as a researcher and practitioner in language education, they help to unfold my ‘story’ and provide a wider context for the submitted work.

A number of authors (Álvarez *et al.*, Bloom, Cohen, Hauck & Hampel, Murphy, Truman and White) have cited one or more of my publications in a book currently in press: Hurd, S. and Lewis, T. (eds) (2008) *Language Learning Strategies in Independent Settings* which is not part of this submission. I would like to stress the fact that there was complete authorial autonomy for all contributors, and that each chapter was independently reviewed by two or more referees.

1 INTRODUCTION

1.1 Context of the publications

The thesis draws on publications spanning ten years of development as a teacher and researcher in distance language education. But the process of development started at least two decades before that, when as a teacher of languages in adult education I gained early experience in the challenges of managing independent learning (informally) with very mixed groups of adult learners who attended a once weekly one-and-a-half or two-hour session. It very soon became clear that ‘homework’ took on a different meaning if these students were to make any progress at all in gaining language proficiency. In addition to conventional tasks that needed to be carried out – comprehensions, grammar exercises, essays – it involved an effort on my part to find out about their hopes, fears, needs and aspirations, their levels of self-awareness, the critical factors that would lead to their success or failure, and the ways in which initial enthusiasm could be sustained, and frustrations and difficulties minimised. I observed very early on that unless you paid attention to affective issues along with cognitive and metacognitive, many learners would not thrive in their attempts to learn another language.

My research has increasingly been learner-focused, in line with a setting that is learner-centred in that the tutor is largely, if not entirely, absent. I have been drawn to investigate what it is that motivates learners to learn a language particularly in distance mode, how they maintain that motivation often in the face of severe constraints, how their beliefs and expectations shape the ways in which they learn, the specific language-related anxieties they feel, the strategies they use to cope with a distance environment and how they change and grow through the process of learning in this mode. In all these adult language learning

contexts, themes began to emerge: learner autonomy; individual difference, in particular affective differences; learning strategies; and learner support. These constructs interrelate in a number of different ways and the links between them are not linear, uni-directional or transparent. They are dynamic, elusive and often problematic, just as the constructs themselves. Adult learners are diverse in their needs and aspirations, aptitudes and abilities, motivations and anxieties, personalities and beliefs. All of these factors have an influence on the ways in which they approach their studies – how they learn, the learning strategies they adopt – and ultimately on whether the outcomes of their learning are successful or unsuccessful. In addition to these there are contextual factors, such as distance and the need for self-regulation, and the mismatch between learning a language that is an essentially social activity and a learning environment that is characterised by physical remoteness. Together, these present a truly complex mix of variables. Moreover, in the case of distance learning, an additional challenge is access, the difficulty of finding out anything about a group of learners who are dispersed and often isolated, whether through volition or circumstance.

My first published papers which appeared in *Netword* (Hurd, 1989, 1990a, 1990b, 1991, 1993a, 1994a, 1994c, 1996a), a bulletin for language teachers of adults (CiLT), were short and teaching-focused, dealing with topics such as ‘Teaching Languages for Business: A personal approach’ (1990a); ‘Languages in HE and AE: What can they offer each other?’ (1993a); and ‘Independent Learning: Issues for teachers and learners’ (1994c). I also presented a number of papers during that period to other language teachers in *Netword* groups on a variety of learning and teaching topics: mixed ability language teaching; keeping students motivated; using language games and activities; the place of grammar in the languages curriculum; creating your own materials for language learning; the communicative approach to language learning; setting up a resources bank; and learning later.

The Adult Language Learner (Arthur & Hurd, eds, 1992) was a collected volume which in many ways formed my 'starting block'. The five chapters that I authored are an early indication of being a reflective practitioner, of stepping back and analysing the characteristics of adult language learners who came to class once a week and studied the rest of the time on their own. I was interested in their prior knowledge and potential, what interested them, motivated them and helped them learn; what kind of support they needed and above all, what I could do as a teacher to retain them, in other words the influence of my input in the classroom and outside. It was a time that marked an emerging view of autonomy and its relationship with learning, which was to develop radically and speedily in my first post in higher education. *The Adult Language Learner* was followed in 1994, when I was Coordinator of Language Learning Development at the University of Central Lancashire, by a chapter in *Self-access and the Adult Language Learner* which presented a case study of practice in autonomous language learning (Hurd, 1994f).

The selected publications in this thesis chart the progression of my ideas as I moved from languages in adult education to Institution-wide language programmes (IWLPs) in universities and then to distance language learning at the Open University, UK. I was also moving from primarily classroom-based learning with full tutor presence (albeit a once-a-week only class), to face-to-face lessons supported by structured or unstructured self-access elements for independent learning, to a learning setting in which the tutor was in-print, not in person, and where the emphasis was on learner responsibility and learner choice. The submission represents, therefore, a chunk of time that is the final third of a continuum which began over 30 years ago. The outputs, which embrace a wide range of international refereed language and educational journals (*Foreign Language Annals*; *Language Learning Journal*; *New Academic*; *System*; *Links and Letters*; *European Journal of Open, Distance and E-learning*; *Distance Education*; and *Innovation in*

Language Learning and Teaching), have been shaped by earlier experiences and reflective observations. I have developed my arguments and hypotheses in concert with my writing of materials, first for self-access language learning and subsequently for distance learners at all levels. A particular interest has been the development of ‘support’ materials, for example awareness-raising techniques and strategy development, which aim to equip learners with the tools they need to cope with the challenges of learning outside the conventional infrastructure of the classroom, and to take control of their learning.

The order of the publications is chronological within each part, but because there is constant interplay among the concepts discussed, the sequence of ideas is not linear. While publications 1-5 are concerned primarily with autonomy, they also touch on metacognition and affect, strategies and learner support. Similarly, in publications 6-12 which move from a focus on the metacognitive to the affective domain, autonomy is a continuing theme that underpins many of the arguments put forward. My focal point was autonomy, and in developing theoretical considerations of this concept and relating them to practice, I have been led towards psychological, social, cultural and contextual considerations. What has emerged so far from my own research, in particular the empirical studies I have carried out with distance language learners which inform Part Two of this thesis, is a growing certainty that second language acquisition (SLA) is a highly complex phenomenon that involves a wide range of processes, as well as skills and abilities, and that any attempt to understand its multi-faceted nature is a truly interdisciplinary endeavour.

1.2 Personal context: an emerging research agenda

Looking back on my life experiences, professional opportunities and decisions has allowed me to map out how my ideas have progressed and evolved over a period of time,

and to evaluate the impact of life events on my development as a researcher. In line with Burgess (2001: 11) ‘... through exploring the biographical background of my work, I am able to clarify the rationale for my research’. The preliminary tasks carried out before embarking on the writing of this thesis have facilitated the process of reflection and enabled the coherence of thought underlying the writing of articles and chapters over a period of time to emerge in a more tangible manner.

After 16 years of teaching languages in adult education, in the classroom, at summer schools, during regular trips with students to Paris and in a variety of other informal contexts, I applied in 1992 for a lecturing post at the University of Central Lancashire and was successful. It was a time of significant expansion in languages for non-specialist learners on IWLPs and marked a sharp move away from the emphasis on language specialist single or joint degrees (Coleman & Klapper, 2005; Fay & Ferney, 2000; Ferney, 2005). Anyone could learn a language, whatever else they were studying and however unsuccessful they had been at learning languages at school, and get credits – it was a ‘languages for all’ era. But while language provision was expanding, particularly in the new universities where often up to 15 languages were on offer, it was also a time of cost-cutting and pressure to prove cost-effectiveness. Language departments and centres were taking on large numbers of students and enjoying the revenue that accompanied them, while at the same time desperately striving to find cheap ways to teach them. Large numbers of part-time tutors were recruited particularly for the lesser known languages at the time, like Arabic or Mandarin Chinese. Language specialists were in many instances persuaded or even compelled to teach beginners, a level with which they were in most cases entirely unfamiliar, as part of their teaching allocation. The main ‘solution’ to the so-called ‘massification’ of languages in higher education was to set up self-access or language learning centres, housing a variety of print-based and audio-visual material, and also equipped with the latest technology. New technologies such as satellite TV and

CALL materials networked and/or available on CD-ROM and laser disc allowed more freedom and choice for learners and encouraged greater student-centredness. In many universities this went hand in hand with a reduction in class-contact hours, commonly from three to two hours per week. The idea was that students would learn independently for that non-taught hour, using the resources in their centre. The reality was that many did not, and those who did visit the centre needed a great deal of guidance in how to access and use the materials appropriate to their needs and level of proficiency. Many managers appeared to hold the view that surrounding students with resources was tantamount to providing a good learning environment, and that teachers were increasingly dispensable.

In my own University, it was recognised early on that the materials for independent learning needed to be carefully designed to link into the taught programme and that the two learning experiences should aim to provide a seamless continuity. Integrated independent learning was the favoured position rather than taught classes plus bolt-on independent elements. As Coordinator for Language Learning Development, my brief was to lead a materials development team and provide staff training in learner autonomy and how this impacted on traditional teaching and learning roles. It was a huge and exciting challenge. The experience of teaching in adult education had prepared me to some extent for the materials preparation side – I had written and designed many course elements for students to work through on their own – but I had not carried out any research into the concept of learner autonomy, how it applied to the language learning situation, how it could be implemented into an existing programme, or the implications for learners and teachers. The two years that I spent in this role were a tremendous opportunity to become knowledgeable about these aspects but also to link theory with practice in a very immediate way. The University was also keen to be at the forefront of these new developments and I was asked with others to host several workshops and development sessions to which academics from other universities operating similar schemes were

invited (Hurd, 1993b, 1993c, 1993d, 1993e, 1994e). It was also necessary to provide a sound rationale, based on theoretical precepts as opposed to financial, practical or other grounds, for this innovative way of delivering courses to students. Sceptical lecturers needed to be convinced and taken on board, as did those involved with quality assurance issues, such as external examiners. Exploring and sharing these issues led to invited presentations and papers at a number of other institutions (Hurd, 1993f, 1993g, 1993h, 1994b, 1994d, 1994g).

I was fortunate to be in the right place at the right time, and used this opportunity to the full. It was exciting to be part of a new wave of thinking in higher education which was controversial and needed academic justification and respectability. Research into learner autonomy in self-access language learning settings was in the early stages and I was keen to play a role. Although in languages in higher education the move to self-access had been prompted by a massive increase in take-up and financial considerations, it was also happening at a time of increasing interest in the role of autonomy in language learning, following debates in the literature going back to the 1970s and early 80s, particularly within the *Centre de Recherches d'Applications Pédagogiques en Langues* (CRAPEL) in Nancy, France (Esch, 1976; Holec, 1981; Oskarsson, 1978; Riley, 1976; Trim, 1976), and continuing throughout the 1980s and into the 90s (Brooks & Grundy, 1988; Davies, 1987; Dickinson, 1987; Gathercole, 1990; Little, 1989, 1991; Riley, 1985). There was a growing realisation that learners who took some responsibility for their own learning were often more successful in any learning situation. Autonomy was becoming, if not yet an educational goal, at least a concept that merited serious consideration. For languages, the late 1980s and early 1990s also marked the start of research into the use of specific strategies to make language learning more effective in any context (Dickinson, 1992; O'Malley & Chamot, 1990; Oxford, 1990; Wenden, 1991; Wenden & Rubin, 1987). With the focus on taking personal responsibility, this development was particularly relevant to

independent learning contexts. At the same time, practical issues in setting up self-access language centres and designing appropriate materials had begun to be addressed, with English language learning leading the way (Ellis & Sinclair, 1989; Sheerin, 1989, 1991).

In 1994, I was seconded to a temporary 2-year lectureship (which was then made permanent) at the Open University, UK. It was for me a natural move. I had learned a great deal in a relatively short time about new learning and teaching methods and their impact on staff, and about training and development needs for both teachers and learners. Influenced by the growing number of articles on aspects of the theory and practice of autonomy as outlined above, I had delivered papers and published a chapter in a book on self-access language learning on the Language Learning Centre at the University of Central Lancashire (1994f, Esch, ed.). I left behind a dynamic team who were well aware of the issues involved, and have since applied the early theories to other aspects of course provision such as portfolio assessment. Moving from self-access to distance language learning provided further opportunities for research in an environment where autonomy had an even greater role. Over the next few years I continued to give invited papers and research seminars at UK universities, in which the topic moved gradually from more practical considerations in setting up self-access learning to investigations of the concepts implied by autonomous approaches in all independent learning settings, in particular metacognition and learner support (Hurd, 1996b, 1997a, 1997b, 1997c, 1999b, 1999c, 2000b).

The year 2001 marked a shift in the focus of my research from a mainly cognitive to a more holistic perspective which embraced the affective domain and explored the interrelationships between metacognition and affect in independent language learning from an individual differences perspective (Hurd, 2001b, 2002, 2003a, 2006a). I started to consider the emotional dimension of learning a language at a distance (Hurd, 2003b) and

since then have sought out research methods which have the potential to probe this area and bring greater understanding of the issues involved (Hurd, 2006b, 2006d, 2007b, 2007c). That process continues as I search for new opportunities for investigating the affective side of language learning, in particular those brought about by the rapid developments in communication technologies and online social networking, commonly referred to as the ‘virtual revolution’.

1.3 Approaches and methods

The overall aims of my research have been (1) to bring clarity to the concept of autonomy in theory and practice, through analysing, reviewing and synthesising research in the field, and applying it to independent language learning contexts, and (2) to develop a greater understanding of language learning from an independent learner perspective in order to identify issues for learner support in the development of autonomy and self-regulation, and stimulate debate on appropriate action. In my attempts to achieve these aims, I have adopted frameworks and methodologies that embrace predominantly interpretive as opposed to positivist paradigms (Burgess *et al.*, 2006; Stainton-Rogers, 2006). My research questions have focused on different aspects of the learner experience in independent language learning contexts, for which I have found a quantitative/qualitative framework incorporating mixed methods to be the most appropriate (Hammersley, 1996; Mason, 1994). This approach has involved evaluative, exploratory, interpretative and ethnographic methods, using instruments such as questionnaires, one-to-one interviews, focus groups and think-aloud verbal protocols (TAPs) which involve ‘stream-of-consciousness disclosure of thought processes without analysis’ (Cohen, 1996: 7). Questionnaires have facilitated data gathering from large numbers of participants and enabled the process of quantification and comparison, particularly in longitudinal studies.

As I argued in 2001, questionnaires can be ‘very useful for giving indications of group norms and, complemented by other tools, such as interviews, observation studies, focus groups and think-aloud procedures, seem particularly suited to research which investigates learner variables with large numbers of language students’ (Hurd, 2001c). Results from semi-structured interviews, focus groups and TAPs have given depth to the broader findings from questionnaires by allowing specific areas to be probed further, and have provided a better balance through giving a degree of control to participants (Nunan, 1992). I have considered other methods such as observation, but decided against their use, largely for practical reasons, notably the difficulty of access to geographically scattered learners for a prolonged period of time. While I consider self-observation methods involving retrospection (Cohen, 1987), such as diary studies, to be very relevant to researching the distance learner experience, I have been drawn in my more recent studies towards self-revelatory methods such as TAPs, because of their immediacy and directness which allow a greater potential for authenticity of data, particularly when analysed in conjunction with data from other sources (Pressley & Afflerbach, 1995; Smagornisky, 1994; Young, 2005). Data analysis, as discussed in the summaries of the articles submitted (see Sections 2.2 and 3.2), has involved the use of SPSS for the analysis of quantitative data and the presentation of statistical results in tables, bar charts and pie charts; and QSR N6 for the analysis of qualitative data as an integral part of the process of segmentation and coding. In line with Horton Merz (2002), I have attempted to develop my own ‘research voice’ through trying out different methods within a broad holistic conceptual framework, and triangulating the data in order to produce a rich and varied picture and potentially increase the reliability and validity of the results (Hammersley, 1996).

In my first three publications (Hurd, 1998a, 1998b, 1999a) (see Sections 2.2.1–2.2.3), I referred to a longitudinal study carried out with learners and teachers involved in self-access language learning at the University of Central Lancashire in 1993-4, the first year

of the implementation of independent learning on the Applied Electives Language Programme. The research instruments were two questionnaires (students) administered at the start and end of courses, and face-to-face semi-structured individual interviews (staff) carried out at the end of the academic year. Questionnaires allowed me to gain a broad overview of students' attitudes to independent language learning and their use of resources in the Language Learning Centre. Interviews with staff enabled me to explore in some depth personal responses and reactions to the implementation of independent learning. I drew on the findings for these articles, together with a review of the literature and my own knowledge and experience, to provide a synthesis of the issues for self-access language learning in practice, and to evaluate different aspects of autonomy, including interpretations and (mis)understandings, pitfalls and possibilities, and psychological, social, pedagogical and practical implications for learners, teachers and managers. My third article extended beyond languages to explore the notion of autonomy as a lifelong transferable skill for students of the 21st century, based on the model of language learning.

Publication 4 (Hurd *et al.*, 2001), which has been widely cited (see Sections 2.2.4 and 5.4), explored autonomy in the distance language context and was original in problematising for the first time the perceived conflict between highly structured materials and autonomous language learning, based on practice at the Open University, UK. The final publication in Part One (Hurd, 2005a) (see Section 2.2.5) was the first to bring together and review issues for autonomy specifically in a distance language learning context. It was thus a wholly original contribution to the autonomy debate whose value has already been recognised in three language journal reviews and eleven citations in refereed journals, book chapters and PhD theses. Both publications 4 and 5 have been submitted for the RAE 2008.

The three empirical longitudinal studies that are discussed in Part Two were all carried out with distance language learners at the Open University, UK between 1998 and 2005.

Publications 6 and 7 (Hurd, 2000a, 2001a) (see Sections 3.2.1 and 3.2.2), were based on the first of these studies ($N = 204$) which used questionnaires at two intervention points during the academic year 1998 and a post-course focus group discussion to investigate different aspects of distance language learning and learner support, including beliefs about successful distance learning; difficulties; strategies; the contribution of different course components to effective learning; and attitudes to tutorials and support materials such as guides and supplements. The participants were students at advanced level registered on the Open University, UK French course *Mises au point*. Questionnaires were chosen as the main research instrument in order to provide statistical information on a wide range of issues. Each questionnaire did, however, contain open-ended sections to allow participants to expand on their answers and give a more personal response. I selected the focus group method as opposed to structured or semi-structured interviews for four main reasons: (1) practical – they are more economical on time, (2) they can be useful in providing supplementary data in studies that rely on survey methods (Morgan, 1997), (3) I could collect concentrated amounts of data in one session, and (4) they encourage open discussion in a supportive atmosphere, which can help to establish a ‘climate of disclosure’ (Wilson, 1997) leading to a potentially rich data set. I did not experience a well-known disadvantage (Burgess *et al.*, 2006; Hargreaves, 2006) i.e. domination of the group by one or more members, nor were there any problems with the composition of the group (four men and four women) or with group management, perhaps because of the degree of built-in homogeneity, given that the eight participants were all studying the same course. I did feel, however, that as they were self-selecting, it was more likely that only reasonably confident and eloquent students would have put themselves forward as volunteers, and this may have constituted a limitation to the use of this method in such a large study.

Publications 6 and 7 both used descriptive statistics from the questionnaires and responses from the focus group to provide answers to the research questions, but analysed distinct sets of data from different perspectives. The focus group discussion expanded further on the results from the questionnaires and provided a more personal dimension to the selected findings reported in both publications. A request for the questionnaires used in this study by a Chinese academic at Shantou Radio and TV University, China, prompted a further article in *Open Learning* (Hurd & Xiao, 2006), in which his and my results were compared from a cross-cultural perspective. An additional publication was a book chapter (Hurd, 2000c, Fay & Ferney, eds). Publication 7 has been submitted for the RAE 2008.

While these two publications were mainly concerned with metacognitive knowledge and strategies, publication 8 (Hurd, 2002) (see Section 3.2.3), marked a shift in focus to foreground the affective domain, as described in the previous section, and was one of the first to draw attention to the importance of affect in distance learning, and bring together a range of affective variables for discussion in a distance context. I revisited the 1998 study and found that, although beliefs were the only aspect of affect that had been specifically included in the research questions, the data from both quantitative (questionnaires) and qualitative sources (the focus group and open-ended questions in the surveys), yielded useful additional information in the affective domain, for example on motivation. In conjunction with the literature on individual difference, in particular affective differences, based on classroom contexts, I made a preliminary evaluation of the role of affective factors in distance language learning and drew together the main issues which I then went on to research in more depth in my next study.

Publications 9-11 (Hauck & Hurd, 2005; Hurd, 2006c, 2007a) (see Sections 3.2.4-3.2.6), drew on different aspects of a large and comprehensive empirical study ($N = 500$) carried

out in 2003-4 with lower-intermediate learners of French enrolled on the Open University, UK course *Ouverture*. This study used two questionnaires with the whole cohort, and audio-recorded think-aloud protocols (TAPs) and one-to-one semi-structured telephone interviews with smaller groups, to investigate perceptions of learning a language; reasons for learning at a distance; advantages and disadvantages; personality; motivation; anxiety; learning styles; learning strategies; tutor and student roles; and support for learning at lower levels. One-to-one recorded telephone interviews allowed a group of participants to build on the findings from the questionnaires, particularly with respect to motivation and anxiety and to give a retrospective overview of their course in general. My experience of using this method largely reflected the view of Arthur (2002, cited in Burgess *et al.*, 2006: 75) that ‘this kind of in-depth research can be very revealing as participants become aware of their own view and attitudes ...’ In this case, students’ personal revelations about staying motivated, managing time effectively and ways of approaching the course materials were particularly valuable.

TAPs were used as a pilot part of the study to gain an ethnographic perspective on the influence of context (in this case the distance environment) on learners’ emotional responses and learning behaviour (Nunan, 1992). The approach tied in with many of Nunan’s characteristics of ethnographic research in that it was contextual, interpretive, organic and data-driven. Particular advantages were: the chance to have direct access to distance students’ mental processes, which had the potential to increase the accuracy and authenticity of the data; the opportunity to gain information on emotions and strategy use (Afflerbach, 2000) in addition to cognitive activity; and practical reasons, i.e. the TAPs could be carried out by distance learners in private in their own living and working environment. Although used extensively in classroom contexts and to some extent with distance language learners, TAPs had not previously been employed to investigate affect

in distance language learning, and I wanted to gauge their potential as a research tool in this particular learning culture as part of the study.

A vast amount of data was generated which provided the material for three articles, focusing on different aspects of the study. The quantitative data was analysed using descriptive statistics. An exploratory-interpretive approach (Grotjahn, 1987) was employed to analyse the findings of the qualitative data, which included the use of QSR N6 for analysis of the think-aloud protocols.

An ethnographic strategy was again adopted in a further study ($N=12$) which was set up the following year 2004-5 using TAPs, this time with beginner learners of French following the Open University, UK course *Bon départ*. This study and the TAPs study from the previous year are discussed and analysed in publication 12 (see Section 3.2.7), which also includes an evaluation of TAPs as a research tool in the context of distance language learning. The use of tree-nodes and sub-nodes in QSR N6 allowed for a fine-grained analysis to be carried out into affective factors, both positive and negative, and the range of strategies adopted to manage the affective side of language learning at a distance. Publication 10 has been submitted for the RAE 2008, with mention in the RA2 of publications 11 and 12 which at the time were in press.

The studies I have designed and executed using a variety of data elicitation methods have had at the heart of their inquiry the learner experience in a distance language learning setting, and have helped to advance knowledge and understanding of the special situation of this group of learners: their perceptions and needs, what they bring to the learning process, and how best we can support them in their efforts to learn independently. I have adopted an ethnographic approach in more recent studies as ‘a way of looking’ (Wolcott, 1999) at these learners, attracted in particular by four of the advantages outlined by

Wolcott: it can be carried out almost anywhere; it can make research not only interesting but adventurous; it provides a rich database; and the end product is a contribution to knowledge. Ethnography also fits well with the increasing emphasis on process models in language learning where constructs such as motivation, anxiety and beliefs interrelate in a ‘dynamic, ever-changing process’ (Dörnyei, 2005: 66), and with the growing recognition that these interrelationships are crucial to an understanding of individual language learning. In the case of the distance environment, White’s (2003: 118) contention that ‘understanding the dynamics of distance learner characteristics has profound implications not only for the design of courses and learner support, but for the individual distance language teacher’, also signals the need for approaches and methods that allow researchers to get a real insight into how learners think, learn and behave within this particular learning culture.

The next two sections examine theoretical considerations underpinning the concept of autonomy as discussed in publications 1-5, and explore four key constructs in relation to autonomy – metacognition, affect, learning strategies and learner support – which form the content of publications 7-12.

2.1 Theoretical background

Autonomy in language learning is a concept that has been interpreted flexibly and, to some extent, loosely by diverse educational practitioners, and applied in a variety of ways to pedagogical practice. It has been variously linked with learning described as self-access, self-directed, flexible, resource-based, correspondence, and open and distance, all of which have elements in common, but none of which are the same. Some are associated with context, some with mode of learning, others with both.

The main protagonists in research into learner autonomy in the field of language learning were and remain Holec (1981, 1985, 2007), Dam (1995, 2000, 2003), Little (1991, 1995, 1996, 1999, 2000, 2001, 2002, 2007), and more recently Benson (1996, 1997, 2001, 2007a, 2007b, 2007c). While Dam's work has mainly involved working with children, many of her ideas and general principles are applicable to adult learners and she has worked closely with others in the field across sectors. The Collins English dictionary defines autonomy as 'freedom to determine one's own actions, behaviour, etc.', and 'autonomous' as 'independent of others'. This largely reflects Holec's view (1981: 3) that autonomy is 'the ability to take charge of one's learning' which is a skill 'to be acquired by "natural" means or in a systematic, deliberate way.' He believes in the absolute freedom of learners to direct all decisions concerning their learning – the what, when, how, in what order and by what means – and to work with 'a reality which he himself constructs and dominates' (Holec, 1981: 21). He could thus be said to hold a constructivist view of autonomy. Benson (2007a: 22) remarks that 'Holec's (1981) definition of learner

autonomy has proved remarkably robust’ and Little (2007: 15) has recently described it as a ‘foundational definition’.

Little (1991: 4), in his early work, talks of autonomy in terms of a ‘*capacity* for detachment, critical reflection, decision-making and independent action’, which is unlikely to be effectively realised without teacher intervention and guidance, and can manifest itself in a number of different ways. As I quote in publication 2 (Hurd, 1998b), Little goes some way to establishing the framework within which the term can be used by outlining ‘misconceptions’ or ‘false assumptions’ about autonomy (1991: 3-4): ‘(1) that autonomous learners make the teacher redundant, (2) that any intervention on the part of the teacher may destroy whatever autonomy the learners have managed to attain, (3) that autonomy is a new methodology, (4) that autonomy is an easily described behaviour (5) that autonomy is a steady state achieved by certain learners’. In line with the thinking of the Russian developmental psychologist, Vygotsky (1978), who theorises learning as a socially-mediated process, Little (1991: 5) maintains that ‘because we are social beings our independence is always balanced by dependence; our essential condition is one of interdependence’ He contends that ‘learners can support one another through their respective ZPDs’ (Little, 2000: 20), referring to Vygotsky’s ‘zones of proximal development’ i.e. the gap between what learners can achieve on their own and what they can achieve in collaboration with others. Little (1996) further considers collaborative learning through social interaction as essential for the reflective and analytic capacity that is central to autonomy. Benson (2001: 49) argues that Little’s definition is complementary to Holec’s, in that it adds ‘a vital psychological dimension, that is often absent in definitions of autonomy’. His own preference is for the term ‘control’ over learning, because such a construct allows for easier examination than ‘charge’ or ‘responsibility’.

Self-access packages and distance learning materials say nothing about autonomy in themselves. Benson (2001: 9) highlights a common assumption among those working in self-access centres that ‘self-access work will automatically lead to autonomy’, and, from the producers of self-instructional and distance learning materials, that ‘autonomy will be one outcome of these modes of learning’. I also argued in 1997 that ‘mere access to materials is not enough’, a theme I developed further in publication 1 (1998: 72-3): ‘... if learners are not trained for autonomy, no amount of surrounding them with resources will foster in them that capacity for active involvement and conscious choice, although it might appear to do so’. I cite Little (2001: 34) in publication 5 (Hurd, 2005a) who maintains that ‘the pursuit of autonomy in formal learning environments must entail explicit conscious processes; otherwise we leave its development to chance’.

The capacity to learn autonomously is related to metacognitive awareness, i.e. awareness of self, of task and of strategy (Wenden, 2001) and a readiness to play an active part in the learning process. While Holec (1985: 189) considers the imposition of a teaching or learning method or autonomous approach on learners as a ‘contradiction in educational terms’, he is, nevertheless, in agreement with Little that it is the teacher's responsibility to help learners achieve the metacognitive awareness and skills that are associated with autonomy, to act as counsellor, helper and facilitator, and to withdraw gradually as learners become more independent.

The surge of interest in autonomy in language learning in the UK in the 1990s and the move towards its implementation in language programmes across the HE sector called for a clear consensus of what it actually meant and how it could impact on the teaching and learning process. Autonomy became a buzzword for modern educational thinking and was ‘embedded’ to various degrees in language learning curricula. More cynically, it was also seen by many managers trying to balance their budgets as a cheaper alternative to

conventional teaching in the context of rapidly growing student numbers on language 'elective' programmes. That consensus did not happen, but as more and more university language departments and language centres attempted to integrate autonomy into their provision and practice, and shared experiences and the advancement of knowledge through seminars and conferences (in particular the IWLP conferences which were held annually throughout the 1990s), the potential, possibilities, obstacles and dangers became clearer, and views began to converge, as I signal in publication 3 (Hurd, 1999a), on several crucial matters: the critical role of the teacher, the need for tutor and learner training and the fact that autonomous learning does not lead to savings in staff time.

Little (2007: 14) notes an important shift of emphasis in the 1990s away from the image of the lone learner: 'learner autonomy now seemed to be a matter of learners doing things not necessarily on their own but for themselves', but he also cautions that even today as we move towards the latter part of the first decade of the 21st century, and after so many years of research and practice 'the practical realisation of autonomy remains elusive' (Little, 2007: 15). Benson's (2001: 47-48) approach is that 'autonomy may be recognised in a variety of forms, but it is important that we are able to identify the form in which we choose to recognise it in the contexts of our own research and practice'. This echoes Davies (1987: 13) who suggested over 20 years ago that it might be more useful to 'ignore the semantics and see if our possible approaches have any common elements which we can use as touchstones to decide our particular approaches in any given situation'. The sharper focus on autonomy in a distance context, where students are learning without the conventional infrastructure of teacher and peer learners, poses a 'dilemma' for distance language practitioners, as in order to support learners and reduce problems of ambiguity or misunderstanding, the materials need to be highly structured and follow a standard pattern. This would seem to exemplify Holec's 'contradiction in educational terms' cited earlier, in that the learning context requires students to be autonomous but the course materials

actively discourage self-regulation. Publication 4 (Hurd *et al.*, 2001) explores these issues and argues the case for autonomy within the materials.

We could conclude that, despite the steady increase in the number of papers devoted to the theory and practice of autonomy in language learning over the last two decades, we have not really progressed very far in our attempts to reach a common definition and agreed practical application. A more positive interpretation would be that the complex debates that have taken place in the research community, covering definitions, practice and effectiveness have been critical in facilitating the consensus now emerging that there is yet no stable, universal understanding of what autonomy means in practice, and that this should be our starting point for the next phase of research. Benson (2007b: 2), for example, sees the emergence of a new approach to researching autonomy from an ‘insider perspective’ which ‘accepts the premise that autonomy may mean different things to different people in different settings’ and involves ‘a close examination of what learners and teachers have to say about the educational processes in which they are engaged’ (Benson, 2007b: 3). He also suggests that an insider perspective is ‘most closely associated with introspective, autobiographical and ethnographic methods’ (Benson, 2007b: 2). The studies on which my publications in Part Two are based reflects Benson’s view in using ethnographic methods to ascertain how language learners think and feel in a distance context and what the implications of their stories might be for learner support in the development of autonomy.

The five publications in Part One mark an attempt to situate autonomy within two independent contexts, self-access and distance. Together they examine theoretical and practical considerations around autonomy and expand on the points made above, with the focus moving towards distance learning. As I point out in a paper I presented at

Nottingham University in 2000, 'Learning to learn at a distance: The part that strategic competence can play in making language learning more effective':

Although much has been written on autonomy, reflection and strategic competence in language learning, the growing body of research into this area has not so far investigated the special situation of those learning a language at a distance. Research into issues implicit in autonomy for supported open and distance language learners is still, therefore, in its early stages. (Hurd, 2000b).

In dealing primarily with the distance context, publications 4 and 5 are an attempt to fill this gap.

2.2 Summary and status of publications 1-5

2.2.1 Publication 1

Hurd, S. (1998a) Too carefully led or too carelessly left alone? *Language Learning Journal* 17, 70-74. ISSN 0957 1736.

Publication 1 was my first major attempt to draw together and explore some of the themes that had emerged from my experience at the University of Central Lancashire where I had a key role in developing and implementing autonomous learning into the curriculum on the Applied Languages Electives Programme.

The massive expansion of higher education was provoking a rethink of provision, and while ever-increasing numbers of language students was in one sense a blessing, it also presented considerable problems to those charged with managing and teaching them. At the same time the student profile was changing to incorporate a much more heterogeneous

mix in terms of age, prior learning and ethnic background, calling for 'a greater recognition of differing motivations and aspirations, and an increasing emphasis on notions of learner diversity and learner choice' (Hurd, 1998a: 70). One response to the 'do more for less' culture was the introduction of self-access elements into course provision. In this way managers could kill two birds with one stone: increase student numbers without a parallel increase in staff numbers, while at the same time be seen to be promoting a major educational advance: the implementation of autonomous learning as an integral part of taught programmes.

In this article I evaluated the limits and possibilities of autonomy in language learning from the point of view of both learner and teacher. I first examined meanings attributed to autonomy, in particular those proposed by Holec and Little, and the interpretation of autonomy by teachers in terms of theory and practice. In so doing, I referred to a longitudinal study I had carried out in 1994, using quantitative and qualitative measures, whose findings illuminated student reactions to autonomous language learning and showed considerable variation in teacher perceptions. They also demonstrated, however, that teachers were seriously debating what they understood by autonomy, and gave early indications of the shift in thinking on autonomy identified by Little (2007) from being something you did *on your own* to something that you did *for yourself*, possibly with others: 'Tutors were not agreed on whether autonomous language learning entailed working on your own exclusively, or whether it could be extended to working in groups independently of the teacher' (Hurd, 1998a: 71).

An analysis of what constituted autonomous practice and what did not was central to this article, and a distinction was made between encouraging students to act autonomously and asking them merely to follow instructions. Underpinning this was the recognition that access to resources was not enough to bring about the capacity to make conscious choices

and actively engage in learning, and that learners needed to be trained for autonomy. Staff development and learner training were highlighted as key factors in successful autonomous learning, although the disappointing reality was that neither of these would be likely to gain support from lecturing staff in the short term, and that ‘depressingly it was likely to remain the case that a few enthusiasts would attempt against all odds, to keep the issues alive and hope gradually to persuade unconvinced staff of the benefits ...’ (Hurd, 1998a: 72). As one of these ‘enthusiasts’, my contribution was to do just that, through discussion, demonstration of good practice and the enlisting of colleagues in research activity. A more promising finding was the fact that working on materials for students to use autonomously was encouraging teachers to reassess their role and their methods, and to focus more closely on their learners. This in turn was raising awareness of the diversity of learner needs, aspirations and abilities, including ethnic and cultural differences which might affect learning style, learning expectations and capacity for autonomy.

The arrival of the virtual classroom and the implications for distance language learning, in particular the role of technology in combating isolation through online exchanges, led to a warning not to lose sight of the ‘human element’ of language learning in the rush to promote autonomy. In conclusion, the article recognised the pitfalls and possibilities of an autonomous approach in the educational climate of the latter half of the 1990s, while at the same time supporting its positive features: the increasing opportunities for language learning and language use; the reappraisal of existing learning and teaching practice, including an understanding of the changing roles of learner and teacher; and, in broader terms, the potential for learners to develop a skill not just for effective language learning but for life.

The empirical study which prompted this article is among the earliest pieces of research into learner autonomy in IWLPs in the UK, in particular teacher attitudes, beliefs and responsibilities.

Gan (2004) makes reference to this article alongside major figures in the field in the context of research into attitudes and strategies in self-directed language learning (SDLL):

Researchers (Wenden 1991, 2001; Hurd 1998; Cotterall 1999; Larsen-Freeman 2001) have suggested that there is a relationship between attitudes and learning outcomes, but how SDLL are specifically related to different levels of success in language learning is still unknown. (Gan, 2004: 390).

Meacher (2001) cites this article in his review of 'Teaching Modern Foreign Languages at Advanced Level' (Pachler, ed., 2000):

While it is true (Stella Hurd) that a reversal of roles occurs when the learners learn to teach themselves, leaving the teacher to provide the resources and to monitor outcomes, we should be warned that if learners are not trained for autonomy, no amount of surrounding them with resources will foster in them the capacity for active involvement. (Meacher, 2001: 88).

It is also cited by Oanh (2007), writing on comparative studies in learner autonomy:

Independent learning is desirable for language learning courses, as Hurd (1998: 70) emphasises, that independent learning "as an integral part of taught programmes has become an increasingly popular options for language departments eager to maximise their diminishing resources." Furthermore, independent learning skills, i.e. the ability to work independently, set own targets, manage time are needed for students so that when they leave universities, they are

well equipped with the necessary transferable skills to face the market place
(Hurd, 1998). (Oanh, 2007: online).

This article is one of four recommended to teacher trainers of modern foreign languages on Learner Autonomy by the Initial Teacher Training for Modern Foreign Languages (ITT MFL) (2006), operated by the National Centre for Languages (CiLT). It is cited by Hurd (2000a, 2005a), appears in the list of references of Agiorgitis (2003) and Ihde (2000), and is included in the Bibliography of Learner Autonomy and the newsletter of the Association Internationale de Linguistique Appliquée (AILA) Scientific Commission on Learner Autonomy in Language Learning (1999).

2.2.2 Publication 2

Hurd, S. (1998b) Autonomy, at any price? Issues and concerns from a British HE perspective. *Foreign Language Annals* (USA) 31 (2), 219-230. ISSN 0015-718X.

Published in a highly ranked international peer-reviewed language journal with double-blind refereeing (see Citation Index, 2006), this second article developed further some of the arguments put forward in the first publication, focusing more closely on combining theory with practice. It identified and addressed key issues and concerns – economic, psychological, social, pedagogical and practical – which affect all those involved in designing, implementing and managing autonomous language learning.

As an example of the practical application of one very distinctive theory of autonomy, Holec's total freedom approach, I turned first to his institution, the *Centre de Recherches d'Applications Pédagogiques* (CRAPEL) in Nancy, France where learners are completely free to choose what and how they learn, and take full responsibility for all decisions

concerning their learning, including setting their own objectives, monitoring progress and measuring attainment. This was compared with the situation in the UK where the fixed goals and predetermined outcomes of university language programmes preclude total freedom, but nonetheless allow for a less extreme version of autonomy where students can take some, if not all decisions. I went on to discuss a number of innovative research projects carried out in British universities, such as Tandem learning, that have produced important findings and raised further questions about the role of autonomy in language learning. While remaining optimistic about the future of autonomy, I nevertheless concluded:

An autonomous approach goes a great deal further than any other approach in empowering students to make decisions about their own learning; however, the problems it poses for teachers, learners and institutions in terms of balancing conflicting priorities, the general lack of agreement about its role, and the fact that it is more often seen as a threat than a positive step forward, continue to mean that attaining universal acceptance is a slow and painful process. (Hurd, 1998b: 223).

The issue of student diversity raised in the previous publication was extended to include psychological considerations, notably ‘student readiness for autonomy as dictated by the psychological make-up of the individual learner’ (Hurd, 1998b: 225). I cited Harri-Augstein and Thomas (1991) in arguing for a balance between an over-permissive and an over-prescriptive approach, which recognises and takes into account potential learner resistance to autonomy and anxiety about their new role, and equips learners with the skills and support they need to become autonomous (Davies, 1987).

To those eager to rush into this new approach to language learning, I sounded a warning that autonomous language learning is neither an easy nor a cheap alternative to conventional forms of delivery, and that without a close look at the key issues involved, it

is unlikely to achieve any measure of success. In conclusion, I called for a consensus on fundamental issues: realism and caution about the amount and degree of autonomy that is practical and possible in any given educational set-up; the place of autonomous language elements within a taught programme; allocation of responsibility for materials development, staff development, learner training, monitoring and evaluation; and cost and time considerations. Finally I drew attention to:

the overwhelming need for a continued sharing of experience and ideas in order to harness the considerable potential of autonomous language learning and to ensure the quality of its content and management within all language programmes’.

(Hurd, 1998b: 229).

Publication 2 contributed to the field of autonomy in language learning through its analysis of current practice, its focus on key considerations for institutional managers and teachers, its exploration of readiness for autonomy, and its emphasis on realistic perspectives and practicalities. Drawing together pedagogical and psychological considerations within a costed approach added an important dimension to the debate, clarifying relationships and recognising what autonomy has to offer, while at the same time taking account of the realities of autonomous learning and the demands it places on all those involved in its design, implementation and management.

This article is cited by Benson (2007a), one of the major figures in the field of language learner autonomy, in a recent state-of-the-art article for *Language Teaching*:

The proliferation of self-access centres in the 1990s was motivated by a complex combination of economic, technological and educational concerns and presented both opportunities and dilemmas for teachers favouring autonomy. Hurd’s (1998: 219) account of the process mentions how “many lecturers interpreted the call to push ahead with autonomy as a criticism of current practice and a ploy to reduce

teaching staff” [...] In some cases, Hurd notes, there were actually too many students for the available facilities: “if some students were not remiss in carrying out their centre-based self-access work centres would not be able to cope” (1998: 229). (Benson, 2007a: 33).

This article is also cited by Tang and Yang (2000) and Hurd (2000a, 2001a, 2005a). It is included in the Bibliography of Learner Autonomy, the newsletter of the Association Internationale de Linguistique Appliquée (AILA) Scientific Commission on Learner Autonomy in Language Learning (1999) and the list of references of Agiorgitis (2003). In addition, it is one of the texts recommended by Tandem City, and appears in a list of articles ‘of particular interest to professionals in foreign language education’ which have ‘appeared in some of the major journals on language teaching and learning’ (Weber & Campbell, 1999).

2.2.3 Publication 3

Hurd, S. (1999a) Developing skills for the 21st century: Lessons from autonomy in language learning. *New Academic* 8 (1), 3-7. ISSN 0964 6353.

Written for a special issue of the *New Academic*, a generic professional journal published by the Staff and Education Development Association (SEDA), publication 3 discussed the role of autonomy in learning as part of the debate about graduate standards, teaching and learning methodologies and assessment measures. The introduction by the editor asked rhetorically: ‘What subject could be more illustrative of the need for the student to take responsibility for learning than language?’ and I attempted in this article to justify that confidence.

Based on findings from my 1994 study, from my evaluation of the literature on autonomy and from my own knowledge and personal experience of teaching on an IWLP, I argued that autonomy is not only a fitting goal in its own right for students in higher education as preparation for lifelong learning, but is also increasingly seen to be closely bound up with the qualities and skills needed for the workplace, such as self-reliance and resourcefulness, flexibility and good time-management, persistence, tolerance and patience.

Using languages as a model, this article identified and brought together some of the key issues that have to be addressed if autonomy is to become more firmly embedded in university curricula across the board. The need for a consensus on terminology was prioritised, for example the abundance of descriptors of various types of independent learning – self-access, self-directed, open, flexible or resource-based – which are often used interchangeably, despite inherent differences. Moreover, although all involve some autonomy on the part of learner and teacher, they are not in themselves autonomous set-ups. The positive aspect of autonomy in allowing a degree of freedom over learning style was balanced with the need to gauge ‘the degree of autonomy that is appropriate in a given context, and avoid rushing in without a clear focus’ (Hurd, 1999a: 4). In this article, I signalled that there was no evidence that teachers have a lesser role in the learning of languages where autonomy is promoted, but that sharing responsibility can help them adjust to the shift in control from teacher to learner as they seek to achieve a different balance between learner, teacher and resources.

Sharing responsibility was an innovatory idea which took shape in an accredited project that I carried out with Level 2 students at the University of Central Lancashire (UCLAN) with funding from the Enterprise in Higher Education Initiative. The assessed ‘product’ was an induction programme for students new to autonomous learning which required them to work initially with staff, then increasingly on their own in small groups to explore

the theory and practice of autonomy. Comments on completion of the project indicated high levels of satisfaction, and appreciation of the transferable skills participants felt they had acquired through taking part in the project. Staff commented on the 'more equal relationship that had become established between teacher and learner' (Hurd, 1999a: 4). This led to a rethink of assessment practice and the introduction of portfolio assessment at UCLAN which included a self-assessed element.

The findings of the project were evidence that teachers do not have a lesser role in a learning process that involves autonomy, but that role is dynamic, responsive and evolving, replacing the more authoritarian and controlling roles of teachers in traditional teaching settings. The potential of new technologies to facilitate interaction and help to build language learning communities was also evaluated, alongside the need for commitment on the part of learner and teacher to investing the time necessary to become familiar with a variety of applications and their use in a language learning context.

I concluded that in encouraging an autonomous approach, we are also providing the grounds for students to develop other crucial skills not just for the market-place but for life in general as independent, self-motivated individuals.

This article contributed to the debate on the development of autonomy as a key skill for the workplace, based on language learning. My main contribution, through the Enterprise in Higher Education project I set up, was to foreground languages in the discussions about graduate standards and the development of key transferable skills, and demonstrate its importance as a discipline that could provide a model of autonomous practice for the sector.

In examining key issues that need to be addressed in higher education generally if students are to be equipped for the 21st century, the article had application beyond the field of

languages. Todd *et al.* (2004) in their investigation of the perceptions and experiences of final-year social science students, refer to my paper in relation to autonomy and the pressure to abandon the dissertation in HE because of the time and expense of developing the autonomous skills necessary for its production:

This pressure reflects recognition that independence and autonomy can only be realized in a context of considerable preparation of learner and teachers before any degree of autonomous learning can be successfully implemented (Hurd, 1999).
(Todd *et al.*, 2004: 336).

With regard to the transferability of autonomy and the contention (Candy, 1991) that autonomy is not ‘content-free’, Erlendsson (2001) contrasts Candy’s view with my own as expressed in publication 3. He states:

However, a possible case can be made as Stella Hurd argues, that: ‘many of the skills which come under the general heading of autonomy, such as the ability to work independently, set your own targets and manage your time, are transferable to other contexts and therefore desirable in their own right’ (1999: 7). No doubt, the differences between Candy’s point and Hurd’s point can be wide-ranging, but in most self-rule learning situations precise subject related autonomous skills and generic autonomous skills operate concomitantly, in a mutually supportive atmosphere. (Erlendsson, 2001: online).

Publication 3 is one of the texts selected by LINUS (1999), and is included in the Bibliography of Learner Autonomy, the list of references of Agiorgitis (2003) and the newsletter of the Association Internationale de Linguistique Appliquée (AILA) Scientific Commission on Learner Autonomy in Language Learning (2000).

2.2.4 Publication 4

Hurd, S., Beaven, T. and Ortega, A. (2001) Developing autonomy in a distance language learning context: Issues and dilemmas for course writers. *System* 29 (3), 341-355. ISSN 0346-251X.

Publications 1-3 concentrated on autonomy in self-access contexts based on my empirical study of 1994 and my own experience, in conjunction with the literature. In these articles, I provided an analysis and synthesis of the main issues that arose, and the implications of these for learners, teachers and managers. Publication 4, for which my contribution was 60%, focused on the distance language learning context, reflecting a shift in emphasis in my research following my move to the Open University, UK.

This publication in an international peer-reviewed journal with double-blind refereeing linked theoretical issues around autonomy with practical approaches to its promotion in a distance learning context. By this point the concept of autonomy was entering into the mainstream of language learning methodology, but, as Benson (1996: 28) had warned: ‘we must recognise that, so far, we have no theory of autonomous language learning’, and that ‘its application in the field of language learning is highly problematic.’

In this paper we explored the complex relationship between autonomy and the teaching and learning of languages at a distance. The article broke new ground in identifying and analysing the tension between learner autonomy and the highly structured nature of distance language learning materials, and in evaluating attempts to address this through careful attention to strategy development in materials design. As one of the first to address these issues in a distance language context, this paper, which has been submitted for the RAE 2008, took forward the state of current knowledge in the field and identified theoretical issues for further research.

The impact of publication 4 has been strong in the field of distance language learning. Its status is recognised in two recent state-of-the-art articles, one on autonomy (Benson, 2007a) and the other on distance language learning (White, 2006). The citations can be grouped according to three main themes: (1) originality and contribution to the field; (2) autonomy in course design: the ‘dilemma’ or conflict between the promotion of autonomy in learning at a distance and the provision of highly structured learning materials; and (3) metacognitive awareness, strategy development and learner training within distance language learning.

The originality of the article in terms of its contribution to distance learning is asserted by Harris (2003: 1): ‘... apart from studies by White (1995) and Hurd *et al.*, (2001), the majority of research is located within a classroom learning situation’. Hauck (2004: online) also draws attention to this article as one of the few pieces of published research relating to the special situation of distance language learners, particularly with regard to ‘the role of metacognitive knowledge and metacognitive strategies in distance language’.

The contribution this article makes to the field is discussed by White (2005a) who chooses it as an example of:

important contributions to the mainstream literature on second language learning [which] have been made by distance education researchers in relation to learner autonomy (e.g. Hurd et al., 2001). (White, 2005a: 56).

In drawing together what she sets out in her book *Language Learning in Distance Education* as ‘key issues in relation to learner autonomy in the distance context’ from ‘researchers and theorists within the field’ (2003: 152), White refers to the approach outlined in publication 4 as the sole example of the concept of autonomy in course design,

which she describes as ‘linked to a particular philosophy of distance learning as distinct from open learning or self-access learning’ (White, 2003: 155). She quotes extensively from the article in terms of the promotion of autonomy (p. 153), learner training (p. 155) and stages in course production (p. 197-8).

Referring to the second strand, the ‘dilemma’ or tension between the promotion of autonomy in learning at a distance and the provision of highly structured learning materials, Harris (2003) compares the approach outlined in publication 4 with her own INSTAL (Individualising Strategies for Adult learners in Language and ICT-learning) project:

Hurd et al. (2001) describe the dilemma of developing an autonomous approach to language learning within an Open University course in which the amount, rate and content of the programme is determined by the course writer. They were able to turn this potential problem into an advantage by presenting specific strategies at specific times to address the particular difficulties a task might raise, so that the SI [strategy instruction] did not occur in a vacuum. The constraints on the INSTAL project are diametrically opposite, the advantage is that there is no predetermined course format or content. The difficulty is that there are no concrete language tasks in which to embed the SI. (Harris, 2003: 3).

Cohen (2008) also cites this ‘dilemma’ and elaborates on how it is addressed at the Open University, UK:

Language educators have called attention to the dilemma posed by the highly structured nature of distance language courses, such as those offered by the Open University (UK), in light of the need that learners have to develop autonomous approaches (Hurd et al., 2001). Using examples from the Spanish Diploma, Hurd et al. have outlined ways in which autonomy can nevertheless be effectively

promoted through careful attention to materials design. One such example that they provide is of how learners can work individually to learn about and self-evaluate both their formal and informal expression of politeness (Hurd et al., 2001: 352-353). This and other strategies can be effectively applied to any independent language learning setting. (Cohen, 2008: in press).

This tension between highly structured materials and an autonomous approach has also been cited by Murphy (2005b, 2007) and Baumann (2007). Murphy describes how:

Hurd et al. (2001) identify tensions between developing autonomy and the constraints of a distance learning context, where learners are given detailed instructions and explanation in order to minimize ambiguity, which White (1999) identifies as problematic for some distance learners. (Murphy, 2007: 74).

Baumann focuses on the role of autonomy within the ‘highly rigid and structured format’ of Open University language learning materials:

Hurd et al. (2001) posed the question as to what sort of role autonomy could play within such a distance learning system and its structures. They argued that the potential constraints of the distance mode can be turned into opportunities for the development of learner autonomy by the use of design features such as study charts and the provision of learning objectives and learner strategy and training. (Baumann, 2007: 95-96).

White (2004, 2006), Vanijdee (2003), Bloom (2008), Thang (2005), Lamy & Hassan (2003), Harris (2003), and Hauck & Hampel (2005), all cite publication 4 with respect to the third strand: metacognitive awareness, strategy development and learner training within distance language learning.

White (2004, 2006) cites this article in two publications as an illustration of strategy development for distance language learners, in particular the ways outlined in the article in which learner autonomy is promoted at the Open University, UK, and the ‘learner training approach [which] aims to scaffold opportunities for learners to manage their independence in optimal ways’ (2004: 3) and ‘facilitates strategy development, critical reflection and fostering student awareness of their learning’ (2006: 251). White (2003) further states in relation to strategy development and the need for self-awareness and self-knowledge:

Hurd et al. (2001: 342-3) argue that in order to be able to succeed in the distance context ‘the distance learner ... must not only find out by trial and error which strategies seem work, but also learn the skills of assessing personal learning needs, including strengths and weaknesses, and have some idea of how to address them and monitor progress. In order to develop these skills, learners need to be self-aware and knowledgeable about their own perception, attitudes and abilities. (White, 2003: 88).

Vanijdee (2003) draws attention to this article as an example of the skills and awareness-raising tasks and activities that can help promote autonomy:

Curriculum and materials writers can also contribute to the development of learner autonomy through attention to materials design, incorporating activities and tasks which promote skills in and awareness of the language learning process (a recent example of this is given in Hurd et al., 2001). (Vanijdee, 2003: 81).

Murphy (2005a: 23), in discussing the skills and capacities necessary for autonomy, cites publication 4 with respect to self-assessment: ‘Other researchers (e.g. Hurd *et al.* 2001; Wenden, 1998) also highlight the importance of self-assessment in successful autonomous learning’. Bloom (2008), in the context of writing, also refers to self-assessment in its relationship to learner autonomy:

As it has been suggested that self-assessment is an important aspect of learner autonomy (Hurd et al., 2001), independent L2 writers may especially benefit from learning to assess their own writing through the revision process. (Bloom, 2008: in press).

Thang (2005) cites this work in connection with theories of the ‘good distance language learner’. Like White (2003), she highlights the Open University, UK approach as a model of good practice:

The approach implemented by the Open University in the UK is a good example to follow. They develop courses that incorporate strategy development and learner training (Hurd et al., 2001). (Thang, 2005: 254).

Publication 4 is further cited by Lamy and Hassan (2003) in connection with good practice in metacognitive learner training:

... researchers have claimed that the most effective distance language learners are those who make use of reflective strategies (White, 1995), and good practice in the distance-teaching of reflection has consisted mainly in embedding metacognitive training into the distance materials themselves (Hurd et al., 2001; Murphy, 2001). (Lamy & Hassan, 2003: 40).

Harris (2003) focuses on motivation along with strategy development:

Of all the self-instructed modes of learning, distance learning requires the greatest degree of autonomy. As Hurd et al. (2001: 34) point out: ‘In order to successfully complete a distance learning programme, learners have to maintain their motivation while working alone and develop a series of strategies that will enable them to work individually. (Harris, 2003: 2).

Hauck and Hampel (2005) also highlight motivation, but within the context of online tutorial attendance:

The pilot studies as well as the first year of presentation of the German course offering tutorials online only have also shown that it is not necessarily any easier to get together for online as for face-to-face meetings, or, as Hurd et al. (2001) put it: 'Motivation is essential, as with it comes persistence when the going gets tough, and energy to keep studying when other commitments encroach on your time'.

When motivation is flagging, voluntary tutorials are often not a priority for students. (Hauck & Hampel, 2005: 269).

Other citations appear in Álvarez *et al.* (2008); Coleman and Klapper (2005); Hurd (2005a, 2006c, 2007a); Hurd & Xiao (2006); Murphy (2008a); Panagiotidis (2005); Ros i Solé and Mardomingo (2004); Ros i Solé and Truman (2005); Soler Cervar *et al.* (2005); and White (2008). This article also appears in the Bibliography of Learner Autonomy and the newsletter of the Association Internationale de Linguistique Appliquée (AILA) Scientific Commission on Learner Autonomy in Language Learning (2002).

The multidisciplinary nature of publication 4 is demonstrated by the fact that it has been cited in journals from disciplines as diverse as theology and nursing education, in discussions about learner autonomy: Harlow (2006); Hewitt-Taylor (2003a; 2003b).

2.2.5 Publication 5

Hurd, S. (February 2005a) Autonomy and the distance language learner. In B. Holmberg, M. Shelley and C. White (eds) *Distance Education and Languages: Evolution and Change* (pp. 1-19). Clevedon: Multilingual Matters. ISBN 1-85359-776-7.

Nearly ten years after Benson's (1996: 28) warning that we did not yet have a theory of autonomous language learning, and that its application to language learning was problematic, I re-evaluated the concept of autonomy in relation to the distance language learner for the first chapter of an edited international volume which critically examined current issues, and included a range of developments and innovative practice within the field of distance language learning.

Drawing together the existing research on learner autonomy over two decades (Holec, 1981, 1985; Little, 1991, 1995, 1996, 2001, 2002; Benson, 2001) and relating it to the distance language learning context, publication 5, which has been submitted for the RAE 2008, presented an entirely new overview offering a rigorous and systematic examination of autonomy as a multidimensional concept. I took as my point of reference the experience of distance language learning at the Open University (UK) and drew on the findings of empirical studies I had carried out into different aspects of autonomy: interpretations and implications; learning strategies and learner support; and cross-cultural issues.

In publication 5, I discussed the impact on autonomy of the affective aspects of learner differences, including beliefs and expectations, motivation, anxiety, introversion and extraversion, moving to autonomy in relation to metacognition and self-regulation. Finally, I used the experience of the Open University (UK), to examine how autonomy might be promoted via computer-mediated communication (CMC), and looked ahead to the potential of new technologies to create learning communities in which autonomy is encouraged through social interaction, learner empowerment and reflection. I concluded with a warning that technology-mediated learning is not problem-free and that, in the effort to address the specific challenges of the distance language learning context, and the exciting potential of new technologies, we need to make sure that we keep in mind the human dimension of language learning.

The book in which this chapter appears is already achieving a high standing in the field of distance language learning and has been favourably reviewed in three refereed language journals. Commenting on the status and value of the book, Aderinoye (2005) in *The International Review of Research in Open and Distance Learning* writes:

I feel that Holmberg and colleagues have written a fine compendium of distance education in relation to language teaching. This book's authors truly stand upon the shoulders of pioneers, such as Charles Toussaint and Gastar Langehscheidt [sic, for Gustav Langenscheidt] (Titmus, 1981) who began what is generally recognised as the first formally organised foreign language correspondence school. [...] Holmberg and colleagues have admirably continued the pioneering spirit of Toussaint's and Langehscheidt's work. (Aderinoye, 2005: 5).

de Nooy (2007) focuses on the relevance and timeliness of the book in her review in *Language Learning & Technology*:

... Distance Education and Languages: Evolution and Change provides insights relevant to all language educators, both in its earlier chapters, which deal with the impact of theoretical developments, and in the later chapters, which provide innovative examples of uses of technology to overcome distance. [...] The book is timely, given the major changes in distance language learning wrought since the 1980s by pedagogical and technological developments. [...] Among developments in language pedagogy, the focus on learner autonomy (Holec, 1981; Little, 1991) and the related shift of emphasis from teaching to learning have had the most obvious impact, as the first six chapters testify. (de Nooy, 2007: 26).

With regard to my chapter, de Nooy (2007) comments on the ‘comprehensive overview of issues’, an overview that was original in bringing together for the first time the concepts of autonomy and distance:

... while autonomy is almost universally accepted by researchers as a goal for learners to develop, debate continues as to how it can be achieved. Hurd (Chapter 1) gives a comprehensive overview of issues such as the apparent contradiction between highly structured course materials and autonomy, whether autonomy is an outcome or indeed a pre-requisite of distance learning, and the role of metacognitive awareness in autonomy. (de Nooy, 2007: 27).

Aderinoye (2005) focuses in particular on the conceptual analysis of autonomy in my chapter, and the examination of relevant questions and key issues:

Starting with a conceptual analysis of autonomy, reflections on definitions, and overview of noted academics Hurd asserts that students do not learn in isolation, but instead through interactions with others – a process which students move through concrete experience, reflection, abstract conceptualization, and action. Hurd then poses some relevant questions: Is autonomy a pre-condition for successful language learning? Or is it a product or goal that emerges from learner’s exposure to certain contextual influences in language? She examines these questions using the concept of autonomy, as pioneered by Holmberg (1983) and how it currently guides the practice of distance education in the OU from the perspectives of course development, student recruitment, material preparation, and learner’s support. She also highlights the role of technology in promoting learner autonomy, particularly using Computer Mediated Communication (CMC). In conclusion, Hurd asserts that if distance language learners are to attain autonomy, they must be capable of learning how to learn, because autonomy

requires insight, a positive attitude, capacity for reflection, the necessity of self-management, and ability to interact with others. (Aderninoye, 2005: 1).

Ramachandran (2005) in *The Linguist* makes reference to the interpretations of autonomy in my chapter and its grounding in a distance context in terms of theory and practice, which had not previously been attempted in the literature:

In chapter 1, Stella Hurd reviews various interpretations of the concept of autonomy and its place within the field of distance language teaching and learning. Hurd also provides an insight into how language teaching at a distance has developed at the Open University, UK (OUUK) and draws on her experience to discuss how autonomy may be promoted via computer-mediated communication while warning that technology mediated learning is not completely problem-free. (Ramachandran, 2005: online).

The concept of autonomy is also discussed by Ciobanu (2006) who cites this chapter in relation to its recognition of the complexity of this concept and the detailed analysis of the issues that it offers. He quotes from it at length:

Like in the case of many other concepts regarding language learning, learner autonomy is perceived as ‘elusive, particularly in relation to language learning and teaching’ (Hurd, 2005). Holec defines learner autonomy as “the ability to take charge of one’s own learning” (Holec in Ding, 2005), but the concept is much more complex. Hurd, for instance, presents a far fuller picture, with references to contrasting views that are still under scrutiny:

‘First, there are questions to do with definition, degree and application. Is [autonomy] the “ability to have and to hold the responsibility for all the decisions concerning all aspects of this learning” (Holec, 1981:3) or is it a “capacity for detachment, critical reflection, decision-making, and independent action” (Little, 1991:4)? Is it an attribute that signifies

“organic independence” (OED online) or does it also imply interdependence? Does it entail complete freedom and responsibility on the part of the learners, or does it come with constraints? Is it something that can be taught, or even imposed on learners, or is it a “contradiction in educational terms” (Holec, 1985:169)? Is it a precondition of successful learning or an outcome of certain modes of learning, for example self-instruction? [...] Collaboration with others through sharing the insights of reflection can enhance knowledge and lead to deeper understanding. Little (1996:211), in line with Vygotskian thinking also claims that “the development of a capacity for reflection and analysis [...] depends on the internalization of a capacity to participate fully and critically in social interactions”’. (Hurd, 2005:1-3)

The conclusion Hurd reaches is that autonomy is in fact a trainable competence. She also argues that, unless students are already trained to be autonomous, no amount of resources ‘will foster in them that capacity for active involvement and conscious choice, although it may appear to do so.’ (2005: 4) Furthermore, while acknowledging the social aspect of learning, she stresses that reflection is just as important for cognitive development. (Ciobanu, 2006:online).

Others who develop this theme are Murphy (2008a: 83-4) who cites the summary I give in publication 5 of the ‘plethora of definitions and terminology used in relation to autonomy’, and Reinders (2007) who refers to my discussion of the elusive nature of the concept of autonomy in relation to language learning.

Publication 5 has also been cited by Baumann (2007) and White (2006, 2008) in relation to course design that promotes autonomy. Hauck and Hurd (2005: online) refer to it and other publications as among the ‘few studies that examine the special situation of those studying in a distance context (see Hurd 2000, 2002, 2005; Hurd *et al.*, 2001; White 1994, 1995, 1999)’. White (2004: 2) refers to my chapter in her discussion of the nature of distance language learning, in particular the new opportunities it offers, for example

flexibility, freedom from input and interactions and ‘the possibility of developing skills in self-direction and management of learning experiences (Hurd 2005, Weasenforth, Meloni and Biesenbach-Lucas, 2004)’. Publication 5 is also cited by Truman (2008) with respect to the role of self-correction in ‘self-regulation (the practical steps taken by learners to manage their own learning) (Hurd, 2005: 10)’, along with other processes such as self-monitoring and self-assessment.

Kuteeva, M. (2006: 614) cites this chapter in relation to CMC and the flexibility of e-resources to allow students to work at their own pace. Hauck and Hampel (2008: in press), also on the subject of CMC, focus on the ‘loss of embodiment’ in virtual spaces which can be perceived as ‘depersonalising, fragmentary and lacking the humanity and intimacy that the face-to-face environment affords (Hurd, 2005: 15)’.

Finally, publication 5 is cited by Hauck and Hurd (2005) and Hurd (2006c) and is included in the Association Internationale de Linguistique Appliquée (AILA): Research network on Learner Autonomy in Language Learning News (2006) and the Bibliography on Learner Autonomy.

3 **PART 2: METACOGNITION AND AFFECT, LEARNING STRATEGIES AND LEARNER SUPPORT**

3.1 Theoretical background

Part One of this thesis discussed the theoretical background to autonomy, highlighting the relationship of autonomy to metacognitive awareness and explicit conscious processes, and the critical role of the tutor in supporting learners at a distance and creating optimum conditions for the development of autonomy. Part Two develops these arguments, expanding on four key themes in relation to autonomy: metacognition, affect, learning strategies and learner support.

Metacognition

Metacognition is a multi-dimensional concept which has a critical role to play in influencing the development of learner autonomy in independent, particularly distance language learning contexts, given the degree to which students need to rely on their own resources. Metacognition, like all ‘meta’ terms, involves being able to take a step back and reflect on your own learning behaviour. Reflection and analysis are two important features that distinguish metacognition from cognition. In other words, you may have developed good cognitive skills, for example, language learning techniques such as repetition for remembering specific lexical items, inferencing, guessing meaning from context, using mnemonics, but you are not demonstrating metacognitive ability unless you have the capacity to know *why* you have used a specific cognitive strategy, *what* you have gained from it and *how* it fits into the overall process.

For Flavell (1976: 232), metacognition is about both knowledge and skills: knowledge ‘concerning one’s own cognitive processes and products’, and skills in terms of the ‘active monitoring and consequent regulation and orchestration of these processes’, that is the strategies that connect with autonomy in that they require personal involvement and direction, such as planning, prioritising and monitoring. O’Malley and Chamot (1990) assert that:

Students without metacognitive approaches are essentially learners without direction or opportunity to plan their learning, monitor their progress, or review their accomplishments and future learning directions. (O’Malley & Chamot, 1990: 8).

They argue further that, on the basis of information to date, metacognition ‘may be the major factor in determining the effectiveness of individuals’ attempts to learn another language’ (Chamot & O’Malley, 1994: 372).

Wenden, as I state in publication 5 (Hurd, 2005a), has written widely on the subject of metacognitive knowledge and makes an explicit link between metacognitive knowledge, self-regulation and autonomy: ‘Recognition of the function of metacognitive knowledge in the self-regulation of learning should contribute to a clearer understanding of learner autonomy [...]. The realization of this potential (*to develop autonomy*) for language learners is in part dependent on their ability to self-regulate or self-direct their learning’ (Wenden, 2001: 62). Wenden’s examples of the influence of metacognitive knowledge on self-regulation include task analysis, in which students call upon their metacognitive knowledge to identify what they need to do and how, and monitoring which she describes as ‘the regulatory skill that oversees the learning process that follows the initial planning. It is the basis for determining how one is progressing, and it is what constitutes the internal feedback i.e. the state of awareness which lets the learner know that he/she has encountered a problem’ (Wenden, 1999: 437).

The demands of a distance learning setting require learners to develop a high degree of metacognitive knowledge, and to be self-aware and knowledgeable about their own perceptions, attitudes and abilities, in order to be able to develop strategic competence. As I suggest in publication 6 (2000):

For distance learners, left to a large extent to their own devices, it could be that metacognitive knowledge and the development of metacognitive skills are not only an essential part of effective learning but also a pre-requisite to it. (Hurd, 2000: 64).

But it is not just the cognitive side of learning that requires students to exercise control. Self-regulation or self-management also includes managing the affective side of learning. In publication 9 (Hauck & Hurd, 2005), we argue this point:

Not only does it [self-management] include self-knowledge and awareness and a reflective capacity, it also relates to the ability to set up optimal learning conditions in different learning contexts, including managing affective considerations such as anxiety and motivation. (Hauck & Hurd, 2005: online).

Our view reflects the thinking of Ehrman *et al.* (2003: 319) that ‘it is at least as important to manage feelings as it is to use more cognitive strategies, since negative feelings reduce the effectiveness of most learning activities’. The next section examines the concept of affect, described as a ‘complex phenomenon in language learning’ (White, 2003: 117).

Affect

The complexity of this concept in language learning is related to the number of variables it covers and its interrelationships with other variables and constructs. Affective factors, including feelings and emotions, motivation, beliefs and anxiety, are increasingly seen to

have a highly influential role in the learning process in that they have the power to enhance learning or, in their negative manifestations, impede or interfere with it in substantial ways. The affective domain encompasses a wide range of elements which reflect the human side of being, and play a part in conditioning behaviour and influencing learning (Arnold, 1999; Dörnyei, 2001, 2005; Ehrman, 1996; Horwitz, 2000, 2001; Horwitz *et al.*, 1986; MacIntyre 1999; Oxford 1990; 1993; 1999; Young 1999). Oxford (1990: 140) states unequivocally that ‘the affective side of the learner is probably one of the very biggest influences on language learning success or failure’ and that it is impossible to overstate the importance of affective factors in terms of their influence on language learning. Others (Gardner & MacIntyre, 1993a, 1993b; Gardner *et al.*, 1997; Horwitz *et al.*, 1986; MacIntyre & Gardner, 1989; 1994; Matsuda & Gobel, 2004; Wang *et al.*, 2008) have indicated substantial links between affective measures and achievement.

While research into affect in the classroom has attracted much interest in the research community, there is little that focuses on independent contexts. The special features of the distance setting, in particular lack of access, and ethical issues to do with respect for privacy and anonymity, compound these difficulties. And yet, as I point out in publication 11 (Hurd, 2007a), it is in this educational setting that the affective dimensions of language learning may have special importance, in that learners need to manage their own feelings in order to compensate for the lack of peer support (Hauck & Hurd, 2005; Harris, 2003; Harris, 2005; White, 2003).

Motivation is the factor most frequently cited as critical to successful learning by distance learners themselves (Hurd, 2000a, 2006c; White, 1999, 2003). This reflects research carried out over three decades which has consistently underlined the importance of motivation as a powerful factor in SLA, closely linked with autonomy, and, in many instances, the best overall predictor of language learning success (Dörnyei 2001; Ellis,

1985; Gardner & Lambert, 1972; Naiman *et al.*, 1978; Oxford & Shearin, 1994). Ushioda (1996: 2) states unambiguously that ‘autonomous language learners are by definition motivated learners’ and that motivation is ‘implicated in a dynamic cyclical relationship with learning experience and success’ (1996: 10). In the case of the distance learner, as I argue in publication 10 (Hurd, 2006c), ‘motivation is directly implicated, given the demands of the distance setting and the need to persevere, sometimes against overwhelming odds’ (Hurd, 2006c: 305).

Beliefs constitute another important affective variable, also strongly associated with autonomy and learner success or failure. Cotterall (1995: 196) argues that ‘the beliefs learners hold may either contribute to or impede the development of their potential for autonomy’. White (1999: 444), in writing about distance language learners, makes a similar point: ‘Attention to expectations and beliefs can contribute to our understanding of the realities of the early stages of self-instruction in language’. For all learners, the power of beliefs, whether grounded in cultural background, psychological make-up or personal experience, is such that they can enable or seriously disable language learning, and this can be exacerbated in a distance setting. I quote Stern in publication 7 (Hurd, 2001a), who reminds us that ‘adult learners are active, task-oriented, and approach their language learning with certain assumptions and beliefs which have a bearing on the way they tackle new language’ (Stern, 1987: xii), and conclude that:

It is crucial that those involved in distance set-ups endeavour to find ways of getting to know as much as possible about their learners’ beliefs in order to be in a position to target their needs and respond appropriately. (Hurd, 2001a: 139).

Alongside motivation and beliefs, anxiety, too, ‘ranks high among affective factors influencing language learning’ (Oxford, 1999: 59). Gardner and MacIntyre (1993b: 183) claim that ‘the single best correlate of achievement is language anxiety’. Research has

focused on a type of anxiety termed ‘language anxiety’ which can be treated as a ‘conceptually distinct variable’ (Horwitz *et al.*, 1986: 125) in that it is related specifically to language situations (Gardner & MacIntyre, 1993a), and is not connected with general (‘trait’) anxiety. Guiora (1983: 8) describes language learning as ‘a profoundly unsettling psychological proposition’ and Horwitz *et al.* (1986: 128) argue that ‘probably no other field of study implicates self-concept and self-expression to the degree that language study does’. Moreover, anxiety can severely inhibit learners from taking control of their learning and of their performance, especially spoken communication. It is also said to be strongly associated with low self-confidence (Cheng *et al.*, 1999), low self-efficacy and introversion. As in the case of motivation, there is a link between anxiety and proficiency levels, with anxiety levels being at their highest early on in language learning, and then declining as proficiency increases (Gardner & MacIntyre 1993a). This is true of distance learners too, who, according to White (1995: 208), report ‘initial feelings of lack of preparedness and lack of confidence and a sense of inadequacy’.

For the distance learner, as I suggest in publication 11 (Hurd, 2007a), it is also important to note that the privacy of the distance setting may be associated with *lack* of anxiety. I add that computer-mediated communication, through giving learners the illusion of anonymity, (Roed, 2003), can also help to boost confidence and maintain motivation (Hampel *et al.*, 2005; Hauck & Hurd, 2005; Thorpe, 2002). Virtual learning environments available 24/7 can provide an ideal opportunity, particularly for independent language learners, to work together, to discuss and reflect on learning, to give and receive support, and thus gradually overcome their inhibitions. Referring to online learning, Macdonald (2003: 378) cites the ‘interplay between competence and affective factors such as growing confidence, motivation and group dynamics’ and ‘the importance of the affective aspects of collaborative working – group cohesion and the evolution of mutual trust’.

Interrelationships between variables and constructs

The interrelationships between motivation, beliefs, anxiety and autonomy are evident in the construct of self-efficacy, the belief that one can cope and succeed. While a strong feeling of self-efficacy can increase motivation and give students the confidence to take risks in their language performance, lack of self-efficacy can lead to motivation dips, increased anxiety and very dependent behaviour (Ehrman, 1996).

Affect is also closely bound up with cognition and metacognition. As Arnold and Brown (1999: 1) point out: 'Neither the cognitive nor the affective has the last word, and, indeed, neither can be separated from the other'. Results from studies carried out with undergraduate language learners in the late 1990s into affect in language learning have highlighted the 'interdependent role that linguistics, cognition and affect play in FL and SL learning' (Yang, 1999: 246). Arnold and Brown (1999: 8) contend that 'the way we feel about ourselves and our capabilities can either facilitate or impede our learning ...' Stevick (1999: 47) asserts that 'affect is encoded to various degrees in the cognitive schemata of memory' and that 'affect participates in the process of learning ... by *interfering* with it.' (1999: 50). The way in which affect 'interferes' with learning is outlined by Ehrman (1996):

... the affective dimension affects how efficiently students can use what they have.

For example, strong motivation tends to help students marshal their assets and skills, whereas low motivation or intense anxiety interferes with their ability to use their skills and abilities. (Ehrman, 1996: 138).

Hayes' (1996) model of the writing process also integrates affect, in particular motivation, with cognitive processes. Ushioda (2007: 22), too, underlines the 'dynamic interplay between cognitive and affective engagement'.

The links between learner variables and their effect on learning continue to be a topic of considerable interest to SLA research. In addition, one of the debatable points about many learner variables is the extent to which they are amenable to change, and if so, at what point and in what way. In publication 8 (Hurd, 2002) I discuss interrelationships between affective variables, learning strategies, autonomy and the learning context, in conjunction with the literature. I cite Oxford and Nyikos (1989: 295) who talk of a ‘chain of variables’ in which they would expect that use of appropriate strategies leads to enhanced actual and perceived proficiency, which in turn creates high self-esteem, which leads to strong motivation, spiralling to still more use of strategies, great actual and perceived proficiency, high self-esteem, improved motivation and so on. One debate which I draw attention to in publication 11 (Hurd, 2007a) and which is still ongoing, concerns the direction of influence of anxiety and learning, with one faction (Horwitz 2000, 2001; MacIntyre, 1995, 1999) maintaining that anxiety can be both a cause and a consequence of poor language learning and performance, and the other (Sparks & Ganschow, 1995, 2000) claiming that anxiety may *result* from poor language learning but does not *cause* it; a dispute that remains unresolved to date (see Sparks & Ganschow, 2007).

Learning context is increasingly cited as a key factor influencing other factors in language learning. Gardner’s socio-educational model of SLA ‘explicitly proposes reciprocal causation’ between individual differences, contexts and outcomes, with particular emphasis given to the ‘very dominant role played by the social context’ (Gardner & MacIntyre, 1993a: 2-8). Other studies also stress the importance of learning context in influencing beliefs and attitudes (Benson & Lor, 1999; Victori, 1999; Sakui & Gaies, 1999). With regard to the distance context, White (1999: 449) goes further in identifying ‘the relationship between the learner and the context as the critical aspects of self-instruction’ with ‘each exerting an influence on the other’. As evidence of this I cite in publications 8 and 10 (Hurd, 2002, 2006c) the ‘metacognitive growth’ experienced by

participants in my 2000 and 2003-4 studies, reflecting White's conclusion from her own study (1999) that the distance learning context itself influences learners to develop their knowledge about themselves as learners, and extend their skills.

Strategies: definitions and classifications

While there is consensus on the relationship between use of appropriate language learning strategies and effective learning, the definition of strategies has been variously described in the literature as 'elusive' (Wenden & Rubin, 1987: 7) 'fuzzy' (Ellis, 1994: 529) and 'fluid' (Gu, 2003: 15), and a variety of classification schemes have been proposed during the last two decades (Kondo & Ying-Ling, 2004; O'Malley & Chamot, 1990; Oxford, 1990; Wenden, 1991; Wenden & Rubin, 1987), which broadly divide strategies into cognitive, metacognitive, social and affective (the last two amalgamated by some to produce a 'socio-affective' category). In her very detailed Strategy Inventory for Language Learning (SILL), Oxford (1990: 17) stated that there is 'no complete agreement on exactly what strategies are; how many strategies exist; how they should be defined, demarcated and categorised ...' and that 'classification conflicts were inevitable'. 16 years later, Tseng *et al.* (2006: 80) contend that there is still '... no coherent argument on exactly what the defining criteria for language learning strategies are' and Macaro (2006: 325) concludes that 'there is clearly a need to revise the theoretical underpinnings of learner strategy research'. Moreover, Oxford (1993) has drawn attention to the predominance of cognitive and metacognitive strategies in the literature and the lack of attention to affective strategies.

Despite the increasingly accepted view of the critical role of affect in successful language learning (Dörnyei, 2001; Griffiths, 2004; Nunan & Lamb, 1996; Oxford & Shearin, 1994; Ushioda, 1996), findings from studies demonstrate that affective strategies are the least frequently used by students (Hong-Nam & Leavell, 2006; Oxford, 1990; Wharton, 2000).

Moreover, it is often the case that those who need them most are least likely to be using them. As Oxford (1993: 177) says: ‘... some of the best learners use *affective* and *social* strategies to control their emotional state, to keep themselves motivated and on-task, and to get help when they need it’ yet many students are largely unaware of the potential of such strategies’. Oxford (1993: 179) considers that a possible reason for this is that learners are ‘not familiar with paying attention to their own feelings and social relationships as part of the L2 learning process’.

The generally low frequency of use of affective strategies was born out in my study using think-aloud protocols, reported in publication 12 (Hurd, 2007b) and discussed in conference papers nationally and internationally (Hurd, 2006c, 2006d, 2007c, 2007d). What also strongly emerged from this study was the use students made of both cognitive and metacognitive strategies to manage their emotions, reinforcing the link discussed earlier between affect and cognition, and calling into question conventional strategy classifications.

Learner support

While some language learners do cope well in distance mode, the majority, according to my studies (1998; 2003-4; 2005), and those of others (Bown, 2006; Harris, 1995; White, 1994, 1995, 1999) need a great deal of support to manage both the cognitive and affective side of their learning. Providing optimum learner support for distance learners is a task which presents many challenges and for which there are no easy or obvious ways to ensure effective action. I state in publication 7 (Hurd, 2001a) that ‘no assumptions can be made about types of learner, learning styles or individual preferences. Moreover, as I assert in publication 8 (Hurd, 2002: online): ‘The path between supporting students on the one hand, and being too prescriptive or directive on the other, is a difficult one to tread, all the more so when you do not know your learners’. I add that it is part of the tension described

by McDonough (1999: 12) as the ‘double-edged relation between teaching people to learn and learner autonomy’.

The role of the tutor in learner support should not be underestimated, and is becoming increasingly demanding as new technologies make rapid inroads into learning and teaching methods and approaches, and learner expectations rise (see White, 2007). Tutors can play a big part in enabling learners to become active agents in their learning, by helping them not to be overcome by feelings of frustration, isolation and anxiety, by developing a sense of community where learners feel they belong, and by providing high quality feedback, including ‘scaffolding’ activities, both cognitive and motivational. Ushioda (2007: 11) depicts ‘motivational scaffolding’ as part of ‘supported learning through the zone of proximal development’ in that it can ‘enhance learners’ feelings of competence and skill development, and thus reinforce their intrinsic motivation’. In the case of distance language learners, White (2003: 187) maintains that ‘feedback plays a critical role ... not only as a response to their performance, but also as a means of providing support, encouragement and motivation to continue’. Participants in my 2003-4 longitudinal study, as reported in publication 10 (Hurd, 2006c), confirmed this view in selecting ‘provide feedback’ as the most important tutor role at both intervention points.

Results from the same study on student roles revealed the importance learners gave to taking responsibility for their own learning, although this does not mean that they had already developed strategic competence and self-regulation. While support from the tutor is critical, there is much that learners can do to help themselves, through setting up self-help groups face-to-face or online. Advances in technology already offer exciting challenges for learning through interaction with a tutor and peers for practice and support. It may be that the anonymity and collaborative nature of computer-mediated communication will have positive implications for distance language learners, as online

learning opportunities become more established in distance institutions such as the Open University, UK.

Independent language learning also creates a challenge for course writers. Unlike in the classroom where teachers can adapt language courses to suit the needs of their current learners, both in terms of course requirements and individual learner differences, those writing at a distance must take on the many roles of teacher-in-the-classroom, but without ready access to their learners (Hurd, 2005b). It is, therefore, of paramount importance that they find ways, however difficult, to familiarise themselves with the diverse range of variables that characterise their students, in particular those that lie in the affective domain, which are particularly difficult to access, but which, as we have seen, are also extremely powerful in their effect on learning.

The complexity of the issues calls for innovative approaches which can extend our knowledge of the language learning process in a distance context and further our understanding of the lived experience of learning a language by distance learners. I quote Elkhahaifi (2005) in publication 12 (Hurd, 2007b) when referring to the call from contemporary researchers in applied linguistics for ‘more empirical studies and different kinds of investigation’ that could ‘reveal useful insights into how students learn’ (Elkhahaifi, 2005: 216). The empirical studies I have carried out (1998, 2003-4, 2005), in particular those that have involved ethnographic methods are, I believe, a step in that direction.

3.2 Summary and status of publications 6-12

3.2.1 Publication 6

Hurd, S. (2000a) Distance language learners and learner support: Beliefs, difficulties and use of strategies. *Links and Letters 7: Autonomy in language learning*, 61-80.

ISSN 1133-7397. Available from:

<http://www.raco.cat/index.php/LinksLetters/article/view/22715/22549>

Published in a peer-reviewed language journal with double blind refereeing, this article addressed the need for distance language learners to develop strategic competence in their learning, in order to cope with ‘the particular strain that isolation, time pressures and conflicting priorities can cause’ (Hurd, 2000a: 62). Applying the literature on learning strategies to the distance context, it suggested that metacognitive strategies such as planning, prioritising and monitoring might have a special relevance for the distance context because of their emphasis on control of learning, a key aspect of autonomy.

Publications 6 and 7 were based on a longitudinal empirical study, carried out in 1998 with 204 students enrolled on the final year of the Diploma in French at the Open University, to investigate learner beliefs about learning a language at a distance, difficulties encountered, attitudes to learner support and the use of strategies. Publication 6 focused on learner variables, beliefs and attitudes, difficulties and strategy use, while publication 7 took as its central theme the concept of learner support, including the use of in-house Open University learner support materials and the role of the tutor. Quantitative methods (questionnaires) were employed at two intervention points to provide an overall picture of learner beliefs at the start and midway point of the course. Descriptive statistics revealed a noticeable gap between learner perceptions of the characteristics of the ‘good distance language learner’ and of themselves as distance language learners. Data analysis

of the type and frequency of the actual strategies students used to manage their learning was a particularly valuable starting point for a reappraisal of current thinking on strategy development through distance language learning materials. Further analysis of the quantitative data on strategy use by gender confirmed, to a certain extent, results from studies with face-to-face learners (Bacon & Finneman, 1992; Oxford & Nyikos, 1989), but there was not sufficient evidence to support the finding from Oxford and Nyikos' (1989: 294) study that gender 'had a profound effect on strategy choice'.

Open-ended questions in the surveys and a follow-up focus group at the end of the course provided qualitative data to give more depth to the quantitative findings. An exploratory-interpretative approach (Grotjahn, 1987) to analysis of the qualitative data allowed for the emergence of some broad themes around the area of learner attitudes towards strategy use and support materials, and this included some anxiety over the amount of work to be covered and the absence of the classroom for oral practice and peer support.

The article called for a more systematic, flexible and realistic approach to the development of metacognitive strategies in course materials, which would take account of learner difficulties and, in many cases, learner resistance. It concluded by identifying a number of key issues for further research, including better communication with learners on the benefits of strategy use, and identification of specific strategies for use at specific times.

Publication 6 is an original and timely contribution to the field in that it is one of the earliest papers to explore key aspects of the distance language learning context from the point of view of the actual learner. It has been cited in a number of papers from leading researchers in the field, including White and Cohen. White (2005b) notes that:

A number of studies have been carried out involving the close investigation of

learners' experiences of studying - both in terms of their conceptions of distance learning (White, 1998) and how they perceive and respond to different learning sources in a course (Hurd, 2000). In many cases the results indicated that the ways in which learners responded to and made use of the course differed substantially and significantly from the views of the course team or other professionals [...] The gap, however, that has become evident in some studies between the agendas and intentions of course designers and tutors, on the one hand, and the agendas and actions of learners on the other (see, for example, Hurd, 2000) should be a source of professional interest, and, in some cases, a source of professional concern. Such research has also raised important questions for practitioners about how courses are designed, trialled, evaluated, and revised, and about the complex relationship between research and practice. (White, 2005b: 172).

Cohen (2008) draws attention to the relationship between strategic competence and achievement as signalled in publication 6:

Hurd (2000) noted in her study the importance of demonstrating the direct link between being more strategic in language learning and resulting language gain. While this link has been demonstrated through interventionist studies involving non-distance courses (see, for example, Cohen, Weaver, & Li, 1998; Macaro, 2001), according to Hurd (2000) the link remains to be studied in the distance learning context. (Cohen, 2008: in press).

Arnó i Macià *et al.* (2003) quote from this article to highlight the need to train learners to be able to make conscious choices in their learning and develop a reflective and critical capacity:

As for learning strategies in relation to distance learning courses or

distributed environments, Hurd (2000: 63) points out that ‘conscious selection and self-directed involvement, both features of strategies ... are also characteristics of an autonomous approach, and of general relevance, therefore to the needs of distance language learners’. She adds ‘for distance learners, left to a large extent to their own devices, it could be that metacognitive knowledge and development of metacognitive skills are not only an essential part of effective learning but also a pre-requisite to it’. In line with this, we believe that if students are to become more effective learners, emphasis should be placed on training them to develop the ability to make choices about learning, as well as to become more reflective, critical and willing to experiment. (Arnó i Macià et al., 2003: online).

Soler Cervera *et al.* (2005) reinforce the need for strategy training:

If, like Holec (1981), we believe that autonomy involves taking responsibility for one’s learning and controlling the learning process, we also assume it is necessary to equip learners with tools that can help them take control. In fact, this entails taking a step further, as Kenning (1996) and Hurd (2000) point out, and it is necessary to help students to develop learner training strategies so that they can become more autonomous. (Soler Cervera et al., 2005: online).

Murphy (2008b) comments with relation to task design and strategy use:

Samuda (2005: 231) notes that findings from studies of task performance suggest the way a task is designed may have differential effects on the kinds of opportunities that are created for language use, supporting Hurd’s (2000: 65) suggestion that the nature of the language learning activities and assessments can determine the nature and extent of learners’ strategy use. (Murphy, 2008b: in press).

Hauck (2003) attests to the originality of this work:

Apart from the work of White (1995, 1997 and 1999) and Hurd (2000, 2002), and Hurd et al. (2001), however, there seems to be very little recent research published about the link between self-awareness, strategic competence and effective learning taking into account the particular situation of distance language learners. (Hauck, 2003: online).

This article is further cited by Agiorgitis (2003); Chela-Flores (2003); Dreyer *et al.* (2005); Ferney (2005); Hauck and Hurd (2005); Hurd (2001a, 2002, 2005a, 2006c and 2007a); Hurd and Xiao (2006); Porte (2003); Soler Cervera *et al.* (2006); and Xiao and Hurd (2007). It also appears in the Bibliography of Learner Autonomy and the Association Internationale de Linguistique Appliquée (AILA) Scientific Commission on Learner Autonomy in Language Learning (2001).

3.2.2 Publication 7

Hurd, S. (2001a) Managing and supporting language learners in open and distance learning environments. In M. Mozzon-McPherson and R. Vismans (eds) *Beyond Language Teaching towards Language Advising* (pp. 135-148). The National Centre for Languages (CiLT) in association with the University of Hull. ISBN 1-902031-81-4.

Publication 7 focused on support issues within the context of open and distance learning.

In this chapter, which has been submitted for the RAE 2008, I argued that, in order to be in a position to advise and support appropriately and effectively, it is necessary to address the many variables that exist in any body of learners and to take these into account when designing a course for distance learners.

The chapter discussed the two main categories of learner support – print-based and person-based – the varying degrees of support needed by individual students, and the critical role of the tutor in motivating, boosting confidence and giving clear guidance in how to develop ‘appropriate learning strategies that will lead to increased autonomy and more effective outcomes’ (Hurd, 2001a: 139). The support of both teacher and other students at tutorials was seen to be an important dimension in combating isolation and encouraging oral interaction in the target language.

Relevant findings from the questionnaires in my 1998 study were brought together and analysed in detail to provide a fuller picture of the difficulties students experience at different stages and the support available. Student attitudes to printed learner support materials were evaluated using descriptive comparative statistics, which revealed that transcripts of recorded material and notes on language and style were considered more valuable than course or study guides.

From the qualitative data (the focus group discussion and open-ended questions in the second survey), I concluded that more and better targeted support through the materials was required to reach as many students as possible, and that learners should also be encouraged to support themselves – through self-help groups and the increasing opportunities for exchange and mutual support offered by the Internet.

The originality of Publication 7 is highlighted by White (2006) in her state-of-the-art review of research into the distance learning of foreign languages:

Hurd (2001) provides the earliest overview of research and practice in supporting language learners within distance learning environments, and reports on a study exploring the use of support by a random sample of third year distance learners of French at the OUUK (N = 204). Questionnaires were sent to participants at the

start of the course, and half-way through, and a focus group procedure (N = 8) was used at the end of the course. Student responses revealed that contact with tutors and attendance at face-to-face study sessions were seen as important contexts for the development of socio-affective dimensions of learner support, to combat isolation, to enhance motivation, and to learn how to approach the assessed components of the course. A noteworthy dimension of Hurd's study is identifying the difficulties students' experienced early on in the course. While a few studies have traced shifts in students' perceptions of their learning process as they progress through a distance language course (see for example White 1999a, 2003), to date an important gap in the literature concerns in-depth study of how learner support requirements develop and change, together with optimal ways of delivering that support at particular stages. (White, 2006: 253-254).

Blin (2002) in her review of the book, writes of my chapter:

Hurd's article (pp. 135–148) concerns distance learners who often need help in developing their strategic competence. She argues that “support through materials is [...] a crucial factor for [distance] learners in the development of metacognitive awareness and autonomous practice”. (Blin, 2002: 331).

Truman (2008: in press) cites this chapter with reference to teaching methodology in a distance language learning context: ‘... as Hurd (2001) observes, the ‘teaching voice’ is present in the learning materials, which constitute the link between teacher and learner’.

Publication 7 has also been cited in Benson (2007c), Coleman and Klapper (2005); Hauck and Hurd (2005); Reinders (2007), Reinders *et al.* (2004) and Xiao (2003), and appears in the Bibliography of Learner Autonomy.

3.2.3 Publication 8

Hurd, S. (2002) Taking account of individual learner differences in the planning and delivery of language courses for open, distance and independent learning. The National Centre for Languages (CiLT), University of Manchester, 24-26 June 2002.

Web conference proceedings:

<http://www.lang.ltsn.ac.uk/resources/conferenceitem.aspx?resourceid=1315>

Publication 8 moved the focus of my research from the metacognitive to the affective domain. In analysing the qualitative findings of my 1998 study in conjunction with the literature, I had become increasingly aware of the power of affective factors and the need to examine these in a distance context alongside the metacognitive dimension of learning. My previous two publications had touched on motivation and anxiety, and I wanted to develop a better understanding of these and other concepts in a distance context. Results from studies carried out with undergraduate language learners in the late 1990s into affect in language learning had indicated ‘substantial links among affective measures and achievement’ (Gardner *et al.*, 1997: 344) and had highlighted the ‘interdependent role that linguistics, cognition and affect play in FL and SL learning’ (Yang, 1999: 246). However, most research on affective learner variables had concentrated on classroom-based learners, and there was very little on those learning in other contexts. In this paper, I drew on relevant findings from my 1998 study, and discussed them in conjunction with the literature on individual difference and affect. I examined some of the interrelationships between affective variables, and their links with cognitive styles and strategies, and finally explored briefly the issues raised with regard to pedagogic intervention in independent learning contexts and the development of learner autonomy.

This paper was one of the first to draw attention to the importance of affect in distance language learning. I focused on the findings relating to motivation, extroversion, introversion and risk-taking, drawing on the literature on classroom-based learning (Dewaele, 2001; Rossier, 1976; Skehan, 1989). Learning context was also discussed as an important variable in influencing beliefs and attitudes. The 1998 study bore out the findings of White's (1999) study with distance language learners in that the qualitative data from the end-of-course focus group provided evidence of 'metacognitive growth', including 'increased self-confidence', being 'more assertive in conversation' 'more willing to take risks and make mistakes'. These findings resonated with White's (1999: 449) view of 'the relationship between the learner and the context as the critical aspects of self-instruction' with 'each exerting an influence on the other'.

Other interrelationships between variables, including motivation, anxiety, beliefs, styles and strategies were explored in conjunction with the literature (Dickinson, 1995; Ellis, 1985, 1999; Gardner and MacIntyre, 1993a; Larsen-Freeman, 2001; Oxford & Nyikos, 1989; Ushioda, 1996; Yang, 1999), in particular the direction of influence, causal agents, mutability and time factors.

I concluded that there was 'considerable scope for further studies, particularly in relation to independent learning contexts' (Hurd, 2002: online), to take account of increasing student diversity, new technologies and new more cost-efficient practices.

Publication 8 could be considered the 'bridge' between metacognition and affect in my work, in that it moved on the discussion to embrace a largely neglected domain, and laid the grounds for a wider debate on this area of special importance in a distance context.

Pilkington and Garner (2004) cite this paper in relation to motivation and feedback:

Stella Hurd in a paper on learner differences in independent language learning contexts explores the role of feedback and motivation in successful independent learning. She models the relationship between the two and highlights the issue of having clear parameters (around tasks) as conditions for successful performance and motivated engagement. (Pilkington and Garner, 2004: online).

The paper has also been cited by Hauck (2004) and Hauck and Hurd (2005) along with publications 4 and 6 as one of the few examples at the time of research into the distance language context, and appears in the Bibliography of Learner Autonomy.

3.2.4 Publication 9

Hauck, M. and Hurd, S. (2005) (50%) Exploring the link between language anxiety and learner self-management in face-to-face and virtual language learning contexts. *European Journal of Open, Distance and E-Learning, (EURODL) II. ISSN 1027-5207.*
Available from:

http://www.eurodl.org/materials/contrib/2005/Mirjam_Hauck.htm

Publication 9 was the first to our knowledge to address foreign language anxiety in virtual as well as face-to-face distance language learning contexts. This article in an international peer-reviewed online journal with double-blind refereeing drew on data from two parallel studies using both quantitative and qualitative methods to provide new insights into the interrelationship between language anxiety and learner self-knowledge and management in distance language learning. The findings on anxiety were drawn from a longitudinal study of affective factors I carried out in 2003-4 with French learners, which was at an initial stage of analysis, and was later presented and discussed in full in publication 11. The article appeared at a time of concern for the complexity of issues involved when

implementing online language tuition in open and distance learning, in particular those relating to the technology used, and how these affect student behaviour and motivation.

This joint article examined the theory underpinning the concepts of language anxiety and learner self-management (LSM). Results from the studies suggested that there is a strong link between cognitive and affective factors and self-esteem, with increased self-awareness having a positive influence on other affective factors such as learners' self-efficacy and achievement beliefs. The findings also indicated that, at least for beginners, direct, interventionist and de-contextualised methods are most apt to foster learner reflection systematically and to enhance learner self-management.

The paper concluded that further research was needed to address the role of self-management skills in enabling learners to deal successfully with so called 'metacognitive experiences', i.e. 'points when learners are confused, or uncertain, or when there is a breakdown in learning' (White, 2003: 140) which are likely to evoke language anxiety. White's studies indicate that such experiences are a 'significant point of growth' for distance language learners and that they are 'not confined to specific learning difficulties, but [...] strongly directed towards a concern about how best to manage their learning within a new context' (White, 2003: 143). In multimodal virtual learning spaces such as audio-graphic conferencing, confusion and uncertainty can at times be caused by the context itself, i.e. the range of modes simultaneously available to enable communication to take place, and the additional technological challenges they raise. This new dimension to LSM called for a more detailed exploration of the metacognitive experiences of distance language learners and the role they could play in reflective online interaction.

The studies analysed in publication 9 are significant in that they belong to a small number of investigations which take the 'self' and the language learning context rather than the

learning task as a starting point for considerations of learner self-awareness and beliefs, and their impact on learner performance.

This paper is cited in White's state-of-the-art article (2006) for its contribution to the field:

Hauck & Hurd (2005) report on two longitudinal studies using questionnaires and interviews to explore language anxiety in distance language learning and the strategies deployed to deal with this in both face-to-face and online tutorial contexts [...]. A contribution of the study is that it explores the kinds of anxiety that can arise within multimodal virtual learning spaces, especially in relation to the variety and simultaneity of modes available, and the extra dimension this adds to the need for learner self-management. (White, 2006: 259).

The article is also cited by In'mani (2006) with reference to strategies to deal with foreign language anxiety; by Hampel *et al.* (2005) in relation to its exploration of learner self-management in virtual environments and online language anxiety; and by Hauck and Hampel (2008) for its contribution to the debate on computer assisted language learning (CALL) and SLA:

Some researchers (e.g. Chapelle & Jamieson, 1986, 1989, 1991; Chapelle, 1990, 1995) have long suggested that investigations of computer assisted language learning should incorporate areas central to second language acquisition.

Learning strategies constitute one such area, yet – apart from an emerging interest in metacognitive strategies (Hauck, 2005; Hauck & Hurd, 2005) – research into strategy use in online settings has, to the authors' knowledge, as yet been scant. (Hauck and Hampel, 2008: in press).

Publication 9 also appears in the Association Internationale de Linguistique Appliquée (AILA): Research network on Learner Autonomy in Language Learning News (2006) and the Bibliography on Learner Autonomy.

3.2.5 Publication 10

10. Hurd, S. (2006c) Towards a better understanding of the dynamic role of the distance language learner: Learner perceptions of personality, motivation, roles and approaches. *Distance Education* 27 (3), 299-325. ISSN 0158-7919.

Publication 10 was the second of three articles which drew on the findings of my empirical study carried out in 2003-4 with 500 students enrolled on the Level 1 French course *Ouverture* for learners at lower-intermediate level.

Published in an international journal with double blind refereeing, this article, which has been submitted for the RAE 2008, discussed the strand of my study which investigated personality, motivation and tutor and student roles in distance language learning, using both quantitative and qualitative methods. In conjunction with the literature, I explored theories and models of motivation, personality and autonomy, and their interrelationships, in the context of an emerging emphasis on process in language learning (Dörnyei, 2005). Multiple elicitation methods within an interpretive framework (questionnaires, think-aloud verbal protocols and one-to-one telephone interviews) at different intervention points during the year of study helped to triangulate the data and thus increase the reliability of the responses. The longitudinal nature of the study made it possible to chart shifting perceptions and evolving approaches as students become more self-aware and active in their learning.

The ‘yoked-subject’ technique (White, 1999) in which students are asked to put themselves in the place of a new learner, was used for the final question of the second questionnaire to elicit from students (and virtually all of them responded) up to three suggestions for learning approaches, based on personal experience, which could be tried out by language learners new to the distance setting. The technique had benefits for the participants, too, in encouraging reflection and critical analysis.

Results reinforced the crucial role of the tutor in providing feedback, and that the most important roles for students were to act on this feedback, to keep going even if they made mistakes and to take responsibility for their own learning. The paper warned that although the findings of the study indicated relatively high levels of metacognitive awareness, nearly half the students were still finding it hard to maintain motivation levels halfway through the course, and a significant minority did not feel they were developing better approaches to learning. Given the importance of motivation in distance language learning, as recognised by learners themselves, suggestions for further research included ‘a more detailed exploration of the elements of motivation specific to distance language learning, in order to provide more targeted support to those who need it’ (Hurd, 2006c: 320) and inclusion of achievement measures in future studies with distance learners, to reflect the acknowledged correlation between motivation and achievement in face-to-face learning.

I concluded that the task for distance practitioners is to focus on how elements specific to language learning impact on the learner at a distance, and to build on the insights shown by learners themselves to improve the design and delivery of distance language programmes.

This article is included in the Association Internationale de Linguistique Appliquée (AILA): Research network on Learner Autonomy in Language Learning News (2006) and the Bibliography on Learner Autonomy. It is also cited in Hurd (2007a, 2007b).

3.2.6 Publication 11

Hurd, S. (2007a) Anxiety and non-anxiety in a distance language learning environment: The distance factor as a modifying influence. *System* 35 (4), 487-508. ISSN 0346-251X.

Publication 11 was the third article based on the 2003-4 longitudinal study with lower-intermediate French learners. Despite many years of research into foreign language (FL) anxiety, no studies had been found that examined this particular phenomenon with respect to the distance language learner. Published in an international peer-reviewed journal with double-blind refereeing, this article marked a new phase in extending research on FL anxiety in the classroom to the distance context.

Given the isolated context and the physical absence of tutor and peers in a distance setting, it seemed likely that FL anxiety might be intensified in this specific context. I therefore set out in this study to test this hypothesis by exploring the nature of language anxiety in a distance learning environment and the strategies students used to cope with it. Surveys administered at the start and midway point of the course were used to give background information, to provide descriptive statistics on anticipated and actual problems with learning a language at a distance and levels of anxiety, and to indicate any global changes in perceptions as the course progressed. I used a slightly modified version of MacIntyre and Gardner's (1994) anxiety measure to examine the specific phases of the distance learning process – input, processing and output – that were associated with anxiety. Open-

ended questions in the two surveys, together with think-aloud protocols and interviews, allowed for a finer grained analysis of student responses on their experience of anxiety, and the strategies they used to cope with it, which gave depth to the more general trends indicated by the questionnaire results.

I concluded that although there were shared aspects of FL anxiety with face-to-face learners, the distance factor could be causally linked to some marked differences with regard to its nature and extent. However, there was also evidence that the distance language learning setting was associated with absence of anxiety for some learners, and I suggested that there was potential for follow-up of these findings and further research.

To my knowledge, this article was among the first to conduct a detailed exploration of FL anxiety in a distance context, and thus made a valuable contribution to the debate. The inclusion of 'non-anxiety' was entirely original and helped to provide a wider, more balanced picture. The paper is included in the Bibliography on Learner Autonomy and cited in Hurd (2007b), but having been available for only a few months, it is probably too early for external citations. However, anonymous reviewers of an earlier draft commented that it was a 'note-worthy paper', 'well-written and well-structured' which 'deals with a very interesting topic ... from a new angle' and 'adds an interesting perspective to existing communicative anxiety'. The study was said to be 'well-designed', 'based on a good sample' and to present 'an original combination of quantitative and qualitative research (triangulation)'. In terms of the methodology which was described as 'clearly outlined', one reviewer considered a 'methodological plus' to be 'the fact that the study is longitudinal. In other words, variations in levels of anxiety in French L2 have been measured over a four-month period'. Another found the student quotes 'very powerful and insightful'. With regard to ethics, a closing comment was that 'the author should be congratulated on the ethical approach to data collection/analysis'.

3.2.7 Publication 12

Hurd, S. (2007b) Distant voices: Learners' stories about the affective side of learning a language at a distance. *Innovation in Language Learning and Teaching*, Special issue: Listening to Learners' Voices 1 (2), 142-159. ISSN 1750-1229.

The final article, publication 12, drew on data from two small-scale pilot ethnographic studies of distance language learners using think-aloud protocols (TAPs) to access their thought processes as they tackled designated language tasks. The first was a strand of my 2003-4 study as outlined earlier, and the second was carried out the following year with a larger group of beginners.

Published in a new international peer-reviewed journal with double-blind refereeing, this article brought a fresh perspective to research in distance language learning in being the first, to my knowledge, to use TAPs as a research tool to investigate affect and strategy use in a distance context.

I started from the premise that distance language learners are likely to be no more skilled in self-regulation than classroom learners, and that we needed to find out more about how they think and cope at a distance. Having used questionnaires, interviews and focus groups in my empirical studies, I was seeking a research tool that had the potential to offer immediate insights into thoughts and feelings about the experience of distance language learning, by allowing participants to speak freely and spontaneously, with no interruptions and no post-editing. A key part of the article was an evaluation of the strengths and weaknesses of TAPs as a research tool, in conjunction with the literature. A notable advantage was the direct access to thought processes, the immediacy and greater potential

for accuracy of the data, and the power of TAPs to ‘reveal aspects of language learning previously inaccessible to investigation’ (Gillette, 1987: 269). Given the small-scale nature of the studies, the findings were intended to be exploratory and not conclusive and to enhance the quantitative results obtained in the main study in each case from questionnaires, by adding the actual voices of a small number of learners.

QSR N6 was employed as an appropriate ethnographic tool to facilitate qualitative analysis, as outlined in Section 1.3. This entailed ‘a continuous process of interrogation and interpretation of the data in accordance with affective themes and their related components’ (Hurd, 2007b: 47). The audio-taped voices provided rich insights into the advantages and disadvantages, pleasures and frustrations, comforts and anxieties of learning a language at a distance, and the ways in which learners manage in a distance environment. Few affective strategies were reported, reflecting Oxford’s (1990: 143) assertion that affective strategies, although potentially important to language learning are ‘woefully underused’. However, participants did use a number of both cognitive and metacognitive strategies to deal with their affective states, demonstrating that affective strategies are not unique in the management of affect, and reinforcing the integral link between cognition and affect (Arnold, 1999; Ehrman, 1996; Flading, quoted in Nielson *et al.*, 2002; Stevick, 1999), as outlined in section 3.1.

The studies underlined the importance of listening to students and using their voices as a basis for discussion for improving aspects of the design and delivery of distance language courses. Despite possible methodological weaknesses which I discussed in the article, I concluded that for distance language learning, ‘the data coming direct from the source constitute a valuable resource which can illuminate our understanding about the experience of being a distance language learner and help shape future provision in line with the needs of learners’ (Hurd, 2007b: 256).

This article appears in the Bibliography on Learner Autonomy and is cited in Hurd (2007a). As in the case of publication 11, it is a very recent article and has, therefore, not attracted any further citations yet. However, anonymous reviewers of an earlier draft commented that it was ‘a highly timely, important and useful topic’ which ‘deals with an area which is under-researched’ and ‘raises a very important issue in the current trend of education, since thousands of new students each year are taking university-level courses in various styles of distance learning online ...’. ‘The author has identified an area which clearly needs exploring: a research puzzle with practical implications’. One reviewer further elaborated: ‘This particular area is fertile for investigations and could provide important contributions to affect as a construct, as well as cognitive processes and the relationship between the two in FL learning’. In terms of quality and presentation, comments were that the article was ‘well researched and well presented’, ‘a strong and useful paper’; ‘very interesting and generally extremely well written and presented, with uncluttered sentences and unambiguous use of words’. Other comments concerned the data: ‘extremely insightful and useful’; ‘the data presented is fascinating’; ‘I found the relationship/interplay between cognitive and affective processes, as exemplified in some of the data reported in this study, intriguing’. With regard to the research tool, one reviewer commented: ‘There are real strengths in the discussion of think-aloud protocols (TAPs) and their applicability and usefulness in distance language learning. In terms of rationale and background discussions I found the paper clear and strong’.

4 CONCLUSION

This thesis has charted the stages of an intellectual journey in which my research perspective has gradually shifted from that of an outsider to an insider. This has increasingly involved qualitative methods and interpretative approaches that strive for understanding rather than explanation (Grotjahn, 1987), allowing a better balance between participant and researcher by making the investigator an integral part of the process. Earlier publications reported studies in which I relied heavily on questionnaires as my main research tool and favoured quantitative data elicitation methods. This was mainly for practical reasons – it is much quicker to give or send out and analyse questionnaires than it is to set up interviews, focus groups, or think-alouds, and record, transcribe, segment and code the data – but, in retrospect, almost certainly associated to some extent with lack of experience and confidence. As my knowledge and confidence grew, so did the desire to try out new methods for investigating the learner experience which would complement the broader findings of questionnaires. This was accompanied by a willingness to take risks and find ways of coping with the time-consuming but rewarding task of analysing ‘rich, tangled webs of interrelated data’ (Yang, 2003: 105) which would add depth to quantitative results and bring me closer to my learners.

In focusing on language learners in independent learning environments I have attempted to extend knowledge and broaden understanding of theoretical and practical issues around autonomy in these learning settings. My first three publications explored autonomy in self-access contexts from a learner, tutor and institutional perspective, at a time when integrated independent language learning on university-wide language programmes was in its infancy and represented relatively uncharted territory for research. Later publications reported on research related to distance learning where many students, whether through volition or circumstance, manage their learning entirely or largely on their own. The

number and range of citations from researchers and theorists testify to the status of my publications and their contribution to the field.

Findings from the studies I have conducted so far have extended knowledge both of the concept of autonomy and of the interrelationship between autonomy, metacognition and affect, and how this impacts on learning materials, learning strategies and learner support at a distance. It is generally acknowledged that strategy development as an integral part of distance language materials can promote autonomy through fostering ‘pedagogic dialogue’ (Little, 1995: 175) and collaboration. As Ehrler (2007: 118) states: ‘Learner autonomy and self-regulation have always been at the heart of the SLA language learner strategy research and remain the goal in strategy research ... with all the complex variables which such research entails’. However, as Murphy (2008a: 92) warns: ‘... simply teaching about strategies is not effective in enhancing language learning and does not support “autonomisation”’. She calls for ‘closer integration between course materials and resources’ and ‘sufficient time for students to engage in collaborative activity, reflection and self-evaluation’ (2008a: 95). Assessment that incorporates credit for reflective activity on learning and strategy use can be very successful in promoting autonomous approaches to language learning, as has been demonstrated by portfolio assessment in university-wide language programmes, and the new e-portfolio which is likely to be incorporated into the assessment strategy of Open University language programmes. The challenge for distance language educators is to keep a balance in the promotion of autonomy by providing optimum scaffolded support without being over-prescriptive or patronising. Learner support mechanisms need to respect learner difference and be flexible enough to cater for diverse variables, sensitively and effectively: a formidable task which raises a number of important questions, all the more so in an environment of learning that is constantly evolving.

The increase in publications in the last decade which investigate the affective domain in language learning (Bown & White, 2006; Dewaele, 2005; Dörnyei, 2005; Harris *et al.*, 2006; Hurd, 2007a, 2007b; MacIntyre, 2002; Shoaib & Dörnyei, 2004) is evidence that affect has entered the mainstream of SLA research. There is also a growing consensus in the field of distance language education that affect has a heightened role in language learning at a distance (Bown, 2006; Harris, 2003; White, 2003), and this has been borne out in the studies I have carried out, particularly with regard to anxiety, motivation and beliefs. My research journey so far has convinced me of the centrality of emotions in the learning process and of the interplay between cognition and affect as interrelated dimensions of language learning. Both constructs are equally important in terms of their influence on the learning process and learning outcomes, and so closely intertwined that it does not make sense to consider them as separate entities in any discussion of language learning, a view maintained by Arnold and Brown (1999: 16) who speak of the ‘difficulty of isolating the cognitive, for at many points affect inevitably enters the picture’.

Affective variables are still, nevertheless, the ‘area that SLA researchers understand the least’ (Scovel, 2001: 140) and this is likely to be related to ‘the complex interdependence of emotions with social and cognitive factors’ (Bown & White, 2007). Negative emotions, low levels of motivation, and negative beliefs about both language learning and self-efficacy as a language learner, all act as barriers to the development of autonomy (Hurd, 2007d). Awareness of these processes at work is the first stage in the difficult task of addressing how to deal with them. At the same time, positive emotions need to be encouraged, so that learners who are coping well and achieving good results can build on success and be confident in developing strategies for when they encounter difficulties. My studies have shown that the attempts of distance language learners to regulate their emotions involve a range of strategies, and that the cognitive and metacognitive tend to predominate over the affective, even when it is affective states that are being addressed.

This leads me to conclude that learners process and mediate their emotions in a variety of ways, and that it is only through listening to them that we are able to extend our understanding of this complex set of issues. Emotions have an impact on everything we do and are ‘pervasive, sensitive and potentially powerful’ (MacIntyre, 2002: 62), yet their variability and temporality make them very difficult to capture in any systematic way. It is for this reason that I would suggest that longitudinal studies and qualitative methods, such as those adopted in my later publications, are likely to be the most appropriate for eliciting data relating to this elusive and often puzzling human phenomenon.

There is some evidence that computer-mediated communication (CMC), while encouraging the development of speaking skills, can at the same time help to reduce anxiety and increase motivation (Debski, 1997; Hampel *et al.*, 2005; Hauck & Hurd, 2005; Lamy & Hampel, 2007; Macdonald, 2003; Roed, 2003), through the integration of learners into learning communities which encourage the establishment of supportive networks. Online tutorials and blended tuition, which are fast becoming the norm in distance language learning, clearly offer an exciting range of opportunities for tutor-to-student(s) and student-to-student live exchanges, but without the natural and spontaneous paralinguistic clues of body language that are an integral part of human communication, and which have yet to be adequately matched by current online ‘affective’ equivalents such as ‘applauding’ icons, emoticons, photo galleries, sound files, and automatic individualised ‘signatures’. It is possible, however, that for distance language learning, the advantages of online communication outweigh any drawbacks, in that learners can communicate over the Internet anywhere and at any time, thus solving one major problem of the distance setting – lack of opportunities for speaking practice. Mobile technologies and social networking sites such as Facebook, Bebo, YouTube, MySpace and Second Life are becoming increasingly popular, have huge potential for language learning (see Cohen, 2008, for an innovative project using Second Life to promote pragmatics), and can

encourage the ‘two-way interaction between individual and distributed cognitions’ advocated by Little (2000: 17). Creating and maximising opportunities for online interaction through the use of blogs, wikis, discussion forums and other tools can help to address the affective challenges of a distance language context, although the risk of new forms of anxiety arising from their use, coupled with further reductions in tutor and peer physical presence, should not be underestimated.

Coe (1994: 238) cites Odell (1987) who ‘contends that research is an ongoing process of discovery and as such, continually requires us to think and rethink not only our understanding of our discipline but also our sense of the questions we should be asking and of the best procedures to analyse our own and our participants’ work. Consequently, there is a sense in which research is never finished.’ In terms of research design, it may be that researchers should stop using classroom-based settings as the default against which they compare other learning settings and modes of practice. Benson (2007d) in a recent conference paper suggests that this is ‘in part a question of research on learning beyond the classroom struggling for its own identity and, in particular, struggling against the idea that classroom learning is the norm or default for learning in a general sense’. The convergence in modes of practice brought about by new technologies may fundamentally shift thinking away from setting towards the ‘everyday world of the learner’ and the realisation that ‘we never learn in one setting alone’ (Benson, 2007d).

In terms of my own agenda, further research is needed to find out more about the influence of personality, situational and other factors on the type and frequency of emotions generated, the strategies used, and the extent to which these are successful. This is a fertile and largely neglected area, given the growing recognition of the critical role of affect in the learning process, particularly for distance language learners. Radical shifts in learning

approaches, as virtual learning environments and multimodal methods become established, intensify the need for new research agendas and innovative methodologies.

As a final comment I would like to return to the underpinning theme of my research, the centrality of the learner from a holistic perspective. It is a theme that is likely to present new challenges as learners respond to the increasing range of opportunities for language learning and adapt to changing modes of practice. In the words of Kramsch: 'Language learners are not just communicators and problems solvers, but whole persons with hearts, bodies, and minds, with memories, fantasies, loyalties, identities' (Kramsch, 2006: 251).

This makes research into the distance language learning experience not only highly complex, but also exciting, intriguing, and a potentially rewarding human enterprise, requiring an open mind and a high degree of flexibility. As Hammersley and Atkinson (1995: 18) so aptly put it: 'We need to reflect only on what seems problematic, while leaving open the possibility that what currently is not problematic may in the future become so'. Significant changes to the language learning experience in relation to technological advances are already taking place, and these are likely to dominate the languages agenda and problematise research in applied linguistics for a considerable time to come. Investigations will continue to call for research methods capable of eliciting data which will enhance our understanding about the experience of being a distance language learner and influence the ways in which we design and deliver courses. It is my hope that in making a contribution to our understanding of issues around autonomy and learner support in the field of distance language education, this thesis will also stimulate interest in new research agendas with a more explicit focus on the affective dimension of learning a language at a distance and the role of affect in SLA.

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